



Education

Toward universal primary education: investments, incentives, and institutions



Achieving the Millennium Development Goals

The UN Millennium Project is an independent advisory body commissioned by the UN Secretary-General to propose the best strategies for meeting the Millennium Development Goals (MDGs). The MDGs are the world's targets for dramatically reducing extreme poverty in its many dimensions by 2015—income poverty, hunger, disease, exclusion, lack of infrastructure and shelter—while promoting gender equality, education, health, and environmental sustainability.

The UN Millennium Project is directed by Professor Jeffrey D. Sachs, Special Advisor to the Secretary-General on the Millennium Development Goals. The bulk of its analytical work has been carried out by 10 thematic task forces comprising more than 250 experts from around the world, including scientists, development practitioners, parliamentarians, policymakers, and representatives from civil society, UN agencies, the World Bank, the International Monetary Fund, and the private sector. The UN Millennium Project reports directly to UN Secretary-General Kofi Annan and United Nations Development Programme Administrator Mark Malloch Brown, in his capacity as Chair of the UN Development Group.

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Toward universal primary education: investments, incentives, and institutions

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Foreword

The world has an unprecedented opportunity to improve the lives of billions of people by adopting practical approaches to meeting the Millennium Development Goals. At the request of the UN Secretary-General Kofi Annan, the UN Millennium Project has identified practical strategies to eradicate poverty by scaling up investments in infrastructure and human capital while promoting gender equality and environmental sustainability. These strategies are described in the UN Millennium Project's report *Investing in Development: A Practical Plan to Achieve the Millennium Development Goals*, which was coauthored by the coordinators of the UN Millennium Project task forces.

The task forces have identified the interventions and policy measures needed to achieve each of the Goals. In *Toward Universal Primary Education: Investments, Incentives and Institutions*, the Task Force on Education and Gender Equality argues that education has the potential to transform societies and to fully realize human capabilities, to prepare workers to participate in the global economy, and to provide citizens with the tools for full engagement in public life—an emphasis that is echoed in *Investing in Development*. The report lays out a clear vision of what will be required to achieve universal primary education in the developing world—specific actions to increase access and demand for education in combination with difficult but feasible improvements in the institutions of the education sector.

Toward Universal Primary Education moves beyond the typical business as usual approach. It argues that bold recommendations are needed not only to expand education systems and increase spending, but also to encourage the key actors, including governments, civil society, and parents, to create the conditions for effective, egalitarian, quality education systems that succeed in bringing the hardest to reach children to school. To support these measures, the report strongly recommends that the international community live up to

commitments already made and increase those commitments as developing countries make progress.

This report was prepared by a group of leading experts who contributed in their personal capacity and volunteered their time to this important task. I am very grateful for their thorough and skilled efforts, and I am sure that the practical options for action in this report will make an important contribution to achieving the Millennium Development Goals. I strongly recommend this report to all who are interested in understanding the range of actions needed to translate the Millennium Development Goal of universal primary education into reality.

Jeffrey D. Sachs
New York
January 17, 2005

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Preface

This report reflects almost two years of work by the members of the Millennium Project Task Force on Education and Gender Equality, an expert advisory group responding to a mandate of the Secretary-General of the United Nations. The members of the task force include presidents and directors of nongovernmental organizations in India, Nigeria, Senegal, the United States, and Zambia; leaders of activist groups in the Dominican Republic and Kenya; scholars in Luxembourg, Mexico, Senegal, the United Kingdom, and the United States; parliamentary and government officials in Brazil, Nigeria, and Uganda; and senior staff and sectoral experts of the United Nations Development Programme, United Nations Children's Fund, United Nations Development Fund for Women, United Nations Educational, Scientific and Cultural Organization, International Labour Organization, World Food Programme, Inter-American Development Bank, and World Bank.

The task force reviewed the enormous amount of material on education in low- and middle-income countries, drawing on academic and official sources. It also commissioned new work to explore special topics. Task force members visited Ethiopia, Ghana, Kenya, Senegal, and Tajikistan, consulting widely with citizens, officials, and educators in these and other countries. Task force members also presented initial findings to UNESCO and to participants at meetings of the UNESCO-sponsored Education for All expert group. The full task force met four times to discuss findings and recommendations. Two subgroups focusing on education and gender equality met several times and benefited from an electronic consultation with civil society organizations to obtain feedback on an initial draft report.

The task force's mandate was to identify strategies that low- and-middle income countries can adopt to achieve universal primary school completion and to make recommendations to the international community of donors on

how best to support countries in achieving that goal. In the spirit of providing a menu of options that must be tailored to meet local conditions, the report identifies critical interventions that have proven to be effective in different settings. It identifies the shortcomings of education systems in many developing countries and emphasizes the changes in institutional arrangements and incentives—for citizens, parents, students, teachers, and policymakers—that are critical if new investments and other interventions are to work.

The task force undertook its work with the recognition that the education sector both influences and is influenced by the broader social and political environment. The report thus emphasizes the need to adopt social and economic policies that stimulate demand for primary education: movement toward a skills-based economy, progress toward democracy, and public sector accountability to citizens. The report also identifies ways in which education—particularly the education of girls and other groups that have systematically been excluded—can profoundly transform societies.

For donors the task force has a simple message: fulfill commitments already made and deepen commitments to countries that are moving strongly toward more and better education for all. This message comes against a backdrop in which donors to education face a crisis of credibility, as the pledges made earlier have yet to be realized. In the view of the task force, there is little need for ever better-documented recommendations if simple promises are not kept.

* * *

The work of the task force reflects a consensus among its members. The arguments set out in this report may not necessarily reflect the individual approach or position of a particular agency or member.

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This report was prepared by a team led by Ruth Levine and Nancy Birdsall (both from the Center for Global Development) and including Kelly Tobin, Anne-Marie Smith, Maria Beatriz Orlando, and Prarthna Dayal. The team was advised by an expert panel of task force members who attended meetings, provided background materials, and offered comments and assistance. This panel included Charles Abani, Charles Barroso, Barbara Bruns (from July 2004), Mayra Buvinic, Winnie Byanyima, Jennifer Chiwela, Christopher Colclough, Diane Elson, Tamara Fox, Carolyn Hannan, Noeleen Heyzer, Ruth Kagia (through July 2004), Lin Lean Lim, Nora Lustig, Karen Mason, Arlene Mitchell, Penina Mlama, Mary Joy Pigozzi, Magaly Pineda, Anastasia Posadskaya-Vanderbeck, Paulo Renato Souza, Richard Sabot, Gita Sen, Gorgui Sow, Gene Sperling, Albert Tuijnman, and Cream Wright.

The report was edited and produced by Meta de Coquereaumont, Barbara Karni, Bruce Ross-Larson, Christopher Trott, and Elaine Wilson of Communications Development Incorporated.

The task force drew from the research and expertise of many institutions that are actively engaged in education-related issues. It thanks those who prepared background papers, wrote notes, made presentations at task force meetings, and provided valuable advice and comments: Rekha Balu, Rosemary Bellew, Claudio de Moura Castro, Michael Clemens, Luis Crouch, Simon Ellis, Caren Grown, Sabeen Hassanali, George Ingram, Anne Jellema, Ruth Kagia, Julie Kennedy, Kenneth King, John Lauglo, Denise Lievesley, Michael

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Several institutions generously hosted or co-organized education task force meetings, events, and field visits. The task force would like to thank Abhimanyu Singh and Khawla Shaheen at UNESCO headquarters in Paris for generously hosting the task force at the Fifth Education for All working group meeting and allowing the task force members to convene their fourth meeting there. It thanks Gita Sen and colleagues at the Indian Institute of Management Bangalore, as well as the Movement for Alternatives and Youth Awareness, DC Scores, and the Forum for African Women Educationalists.

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We are grateful for the comments and contributions from all. Remaining errors are the responsibility of the authors.

Abbreviations

ACE	Asociación Comunal para la Educación (Community Education Association) (El Salvador)
BESO	Basic Education Systems Overhaul (Ethiopia)
CDD	Center for Democracy and Development (Ghana)
CIET	Centro de Investigación de Enfermedades Tropicales (Tropical Disease Research Centre) (Mexico)
CIS	Commonwealth of Independent States
CENAMEC	El Centro Nacional para el Mejoramiento de la Enseñanza de la Ciencia (National Center for the Enhancement of Science Teaching) (Venezuela)
COBET	Complementary Basic Education Program in Tanzania
COPE	Complementary Opportunities for Primary Education
ECLAC	Economic Commission for Latin America and the Caribbean
EDUCO	Educación con Participación de la Comunidad (Community-Managed Schools Program) (El Salvador)
EFA	Education for All
FONABE	Fondo Nacional de Becas (National Fund of Scholarships) (Costa Rica)
FRESH	Focusing Resources on Effective School Health and Nutrition
EPRD	Ethiopian People's Revolutionary Democratic Front
GDP	gross domestic product
IDB	Inter-American Development Bank
IMF	International Monetary Fund
INEE	Inter-Agency Network for Education in Emergencies
ISCED	International Standard Classification of Education
IDA	International Development Association
ILO	International Labour Organization

IFPRI	International Food Policy Research Institute
INEE	Inter-Agency Network for Education in Emergencies
MAYA	Movement for Alternatives and Youth Awareness (India)
MISA	Minimum Income for School Attendance
NGO	nongovernmental organization
NEU	Nueva Escuela Unitaria (New Unitary School) (Guatemala)
OECD	Organisation for Economic Co-operation and Development
PISA	Program for International Student Assessment
PACES	Plan de Ampliación de Cobertura de la Educación Secundaria (Plan for Increasing Secondary School Coverage) (Colombia)
PETI	Programme for the Eradication of Child Labour (Brazil)
PIDI	Programa Integral de Desarrollo Infantil (Integrated program for Infant Development) (Bolivia)
PREAL	El Programa de Promoción de la Reforma Educativa en América Latina y el Caribe (Chile)
PROHECO	Programa de Educación con Participación de la Comunidad (Community-Managed Education Program) (Honduras)
Progres	Programa de Educación, Salud y Alimentación (Mexico)
SAR	Special Administrative Region
SIMCE	System for the Measurement of Educational Quality (Chile)
SACMEQ	Southern and Eastern African Consortium for Monitoring Educational Quality
SNED	National System to Evaluate School Performance (Chile)
UIS	UNESCO Institute for Statistics
UN	United Nations
UNDP	United Nations Development Programme
UNHCR	United Nations High Commissioner for Refugees
UNICEF	United Nations Children's Fund
UNIFEM	United Nations Development Fund for Women
UNESCO	United Nations Educational, Scientific and Cultural Organization
USAID	United States Agency for International Development
WHO	World Health Organization
WFP	World Food Programme



Millennium Development Goals

Goal 1

**Eradicate
extreme poverty
and hunger**

Target 1.

Halve, between 1990 and 2015, the proportion of people whose income is less than \$1 a day

Target 2.

Halve, between 1990 and 2015, the proportion of people who suffer from hunger

Goal 2

**Achieve
universal primary
education**

Target 3.

Ensure that, by 2015, children everywhere, boys and girls alike, will be able to complete a full course of primary schooling

Goal 3

**Promote gender
equality and
empower women**

Target 4.

Eliminate gender disparity in primary and secondary education, preferably by 2005, and in all levels of education no later than 2015

Goal 4

**Reduce child
mortality**

Target 5.

Reduce by two-thirds, between 1990 and 2015, the under-five mortality rate

Goal 5

**Improve
maternal health**

Target 6.

Reduce by three-quarters, between 1990 and 2015, the maternal mortality ratio

Goal 6

**Combat
HIV/AIDS,
malaria, and
other diseases**

Target 7.

Have halted by 2015 and begun to reverse the spread of HIV/AIDS

Target 8.

Have halted by 2015 and begun to reverse the incidence of malaria and other major diseases

Goal 7**Ensure
environmental
sustainability****Target 9.**

Integrate the principles of sustainable development into country policies and programs and reverse the loss of environmental resources

Target 10.

Halve, by 2015, the proportion of people without sustainable access to safe drinking water and basic sanitation

Target 11.

Have achieved by 2020 a significant improvement in the lives of at least 100 million slum dwellers

Goal 8**Develop a global
partnership for
development****Target 12.**

Develop further an open, rule-based, predictable, nondiscriminatory trading and financial system (includes a commitment to good governance, development, and poverty reduction—both nationally and internationally)

Target 13.

Address the special needs of the Least Developed Countries (includes tariff- and quota-free access for Least Developed Countries' exports, enhanced program of debt relief for heavily indebted poor countries [HIPC] and cancellation of official bilateral debt, and more generous official development assistance for countries committed to poverty reduction)

Target 14.

Address the special needs of landlocked developing countries and small island developing states (through the Program of Action for the Sustainable Development of Small Island Developing States and 22nd General Assembly provisions)

Target 15.

Deal comprehensively with the debt problems of developing countries through national and international measures in order to make debt sustainable in the long term

Some of the indicators listed below are monitored separately for the least developed countries, Africa, landlocked developing countries, and small island developing states

Target 16.

In cooperation with developing countries, develop and implement strategies for decent and productive work for youth

Target 17.

In cooperation with pharmaceutical companies, provide access to affordable essential drugs in developing countries

Target 18.

In cooperation with the private sector, make available the benefits of new technologies, especially information and communications technologies

Executive summary

How can the international community reach the global goal of universal primary education and gender parity at all levels of education by 2015? This question is the focus of two of the Millennium Development Goals and of this report.

To reach the Goals, policymakers in developing countries need to take action to bring out-of-school children into the education system and to reform institutions in the education sector, from schools to ministries of education. While primary responsibility for education lies with the governments of developing countries, the international community—particularly bilateral and multilateral financing entities—must live up to key commitments already made, providing much-needed financial and political support for progressive and positive change.

The urgency of the challenge is brought into stark relief by the reality that many countries will miss the 2005 Millennium Development Goal for gender parity in primary education. If there is to be any chance of meeting the 2015 Goals, both developing country governments and the broader international community must dramatically step up the level and nature of their financial, political, and technical commitments.

More than 100 million children of primary school age are not in school, with the worst shortfalls in Africa and South Asia. Girls are disproportionately affected, particularly in Sub-Saharan Africa, South Asia, and East Asia and the Pacific, where 83 percent of all out-of-school girls live.

Completion of schooling is a significant problem. While enrollment has been increasing, many children drop out before finishing the fifth grade (UNESCO 2004b). In Africa, for example, just 51 percent of children (46 percent of girls) complete primary school. In South Asia 74 percent of children (and just 63 percent for girls) do so.

In many countries the rural/urban education gap is the most important factor explaining education differentials

Poor children are less likely to attend school...

Low levels of enrollment and completion are concentrated not only in certain regions but also among certain segments of the population. In every country completion rates are lowest for children from poor households. In Western and Central Africa, the median grade completed by the bottom 40 percent of the income distribution is zero, because less than half of poor children complete even the first year of school.

The education income gap also exacerbates gender disparities. In India, for example, the gap between boys and girls from the richest households is 2.5 percent, but the difference for children from the poorest households is 24 percent (Filmer 1999).

In some countries the main reason for low educational attainment is that children do not enroll in school. In Bangladesh, Benin, Burkina Faso, Côte d'Ivoire, India, Mali, Morocco, Niger, and Senegal more than half of children from the bottom two income quintiles never even enroll. Elsewhere, particularly in Latin America, enrollment may be almost universal, but high repetition and drop-out rates lead to low completion rates. In both cases poor students are much more likely not to complete school.

...as are children in rural areas, children from ethnic and linguistic minorities, children with disabilities, and children affected by armed conflict

In many countries the rural/urban education gap is the most important factor explaining education differentials. In Benin the national completion rate is 39 percent, but the rural rate is just 27 percent. In Mozambique the national completion rate is 26 percent, but the rate in rural areas is 12 percent. The same pattern exists in Burkina Faso, Guinea, Madagascar, Niger, and Togo (Filmer and Pritchett 1998; Filmer 1999). Girls in rural areas register even lower levels of completion, especially in Africa. Rural girls in Benin, Burkina Faso, Guinea, Madagascar, Mozambique, and Niger register rates of primary school completion that are lower than 15 percent.

Ethno-linguistic diversity creates serious challenges in Bangladesh, Ethiopia, and Pakistan. In Balochistan Province (Pakistan), for example, language barriers have a significant impact on access to education, especially for girls in rural areas, where local languages predominate.

About 40 million of the world's out-of-school children have some form of disability. Just 5 percent of these children are estimated to complete primary school, and many never enroll or drop out very early.

Children subject to forced migration and children in conflict situations are particularly disadvantaged with respect to their education. In Somalia, for example, just one in five children of primary school age attends school.

**Examples of
successful
interventions
and evidence
from many
countries
provide a
menu of ideas
for education
leaders**

Institutional problems prevent many children who do attend school from actually learning

Analyses of internationally comparable assessments of learning achievement in math, reading, and science indicate that most developing countries rank far behind OECD countries. Test results in some countries indicate that students are learning virtually nothing.

Countries with weak educational systems can learn from the many developing countries that have made progress

Many countries have managed to build education systems with universal primary completion and considerably more. China, Chile, Cuba, the Republic of Korea, Singapore, the Slovak Republic, Sri Lanka, Tunisia, and Uruguay have also improved quality and learning. Most of these are middle-income countries today, but many achieved universal primary completion when they were at similar stages of development as today's poorer countries.

Even among the poorest countries today, an encouraging number have begun to register strong and sustained increases in primary completion rates. These include many countries in Sub-Saharan Africa. Benin, Burkina Faso, Eritrea, Ethiopia, The Gambia, Guinea, Malawi, Mali, Mozambique, and Togo, for example, increased their primary completion rate by more than 3.5 percent a year—well above the median 1.5 percent annual rate of improvement for low-income countries as a whole. Bhutan, Cambodia, the Lao People's Democratic Republic, Nepal, Nicaragua, Mongolia, and Tajikistan are making similarly strong progress. While all of these countries face major challenges in increasing quality and efficiency—and none could yet be considered a high-performing education system—they are performing considerably better than their peers. The message from these examples is clear: low-income countries can achieve universal primary completion, and it is possible to move faster toward that Goal.

In low-income countries making progress, some key principles have guided policymakers in defining strategies and choosing interventions. Examples of successful interventions and evidence from many countries provide a menu of ideas for education leaders in countries addressing the education Goals.

- *Be pragmatic to reduce costs.* Countries that have jump-started progress toward raising primary completion rates have taken such pragmatic (though often politically difficult) steps as introducing contract teachers, shifting to low-cost school construction methods, resisting pressures to reduce class size much below 40 until universal coverage is achieved, providing free primary education and recovering a larger share of costs at other levels, and shortening the preservice teacher training cycle. All of these actions lower the unit costs of primary schooling and promote faster achievement of universal coverage.

**Countries
must improve
learning
outcomes and
educational
attainment
enough to have
an economic
and social
impact**

- *Focus on teaching and learning.* Even systems with modest standards can keep squarely focused on the teaching-learning process. This includes recruiting teachers based on content mastery; training teachers for “student-centered” or active learning instruction, not frontal teaching; measuring student learning outcomes (and giving teachers the same tests); designing good-quality curricula (in terms of both content and values), books, and materials, and producing them in a cost-effective manner; using local language instruction for the first three to four years of schooling; implementing inexpensive but effective models of in-service teacher training (master teachers, pedagogical advisers, rural teacher self-help networks); and creating performance incentives for teachers that are linked to school and student performance.
- *Make good use of the private sector.* Education systems can capitalize on what private providers can do well by allowing high-quality for-profit private firms serve the top 10 percent of the income distribution, with private finance; by contracting out with private providers; and by working with families and communities to relieve household constraints to schooling (by adapting the school calendar, for example).
- *Watch out for equity.* Education sector policymakers can ensure that the benefits of system expansion are being shared by the poor by setting clear rules for the distribution of resources across different regions and schools; by monitoring outputs and outcomes across schools and regions to identify where performance needs strengthening; by increasing support, pressure, inspection, and skill-specific capacity building that targets the lowest-performing regions and schools; by developing condensed accelerated programs to get drop-outs back in school and up to grade level; by providing targeted subsidies to get and keep vulnerable children in school; and by introducing cost-effective programs to enhance early child development (health programs, nutrition programs, and early stimulation of infants and young children).

Increasing access and improving quality are critical to achieving universal primary education by 2015

Countries that are unlikely to achieve the goal of universal primary education by 2015 (based on historical trends) face two main challenges. First, they must significantly accelerate enrollment and improve their ability to keep children in school. Second, they must improve learning outcomes and educational attainment enough to have an economic and social impact. These countries need to simultaneously increase access and improve quality. The two reinforce each other, because if schools cannot offer a quality education, parents are far less likely to send their children to school.

Parents may see primary school largely as a step their children need to take before continuing their education

How can developing countries get out-of-school children into school?

Three strategies can help get out-of-school children into school: crafting specific interventions to reach out-of-school children, increasing educational opportunities (formal and nonformal) for girls and women, and increasing access to postprimary education. All of these strategies take into account the powerful demand-side influences that affect the propensity of parents to send their children to school.

Encourage children to attend school. Specific interventions have been shown, in some settings, to get hard-to-reach children into school. These include eliminating school fees, instituting conditional cash transfers, using school feeding programs as an incentive to attend school, and implementing school health programs to reduce absenteeism. Several interventions have proved particularly successful where girls' participation is low. These include actions that increase security and privacy for girls, as well as those that reduce gender-stereotyping in the curriculum and that encourage girls to take an active role in their education.

Support mothers. Maternal education is a key determinant of children's attainment. Multiple studies find that a mother's level of education has a strong positive effect on their daughters' enrollment—more than on sons and significantly more than the effect of fathers' education on daughters. Studies from Egypt, Ghana, India, Kenya, Malaysia, Mexico, and Peru all find that mothers with a basic education are substantially more likely to educate their children, especially their daughters, even controlling for other influences (Lavy 1996; Ridker 1997; King and Bellew 1991; Lillard and Willis 1994; Alderman and King 1998; Kambhupati and Pal 2001; Parker and Pederzini 2000; Bhalla, Saigal, and Basu 2003). Some data suggest that literacy programs for uneducated mothers may help increase school participation by their children, implying that support to women's literacy programs should be considered an important complement to interventions to increase access and retention at the primary school level. Adult literacy programs may be particularly useful in settings in which there are pockets of undereducated women, such as ethnic minorities or indigenous communities.

Enhance postprimary education. In some countries the demand for primary education may be determined in part by the availability of secondary education slots, because parents may intuitively understand that the economic benefits of primary schooling alone are not high enough to offset the opportunity cost of attending. Particularly where quality is low, parents may see primary school largely as a necessary step their children need to take before continuing their education.

**Involved
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and mobilize
local resources**

Success in moving close to universal primary school enrollment generates its own new challenges. As more children complete primary school, the private benefits, in higher wages, decline (though the social benefits remain high). Private rates of return—perceived and real—cease to be seen as much of a reason for sending children to primary school, unless there is access to postprimary education. In addition, both expansion of the existing education systems in many developing countries and the “scaling-up” of other public sector functions (particularly health services, water management, general public administration, and others) require a larger cadre of educated and trained workers, the products of postprimary education.

In most developing countries, secondary and other forms of postprimary schooling are heavily slanted toward better-off segments of society—and in most countries toward boys. Countries should begin to identify and implement strategies such as need-based scholarships to overcome the tendencies toward inequitable access.

How can developing countries improve their institutions?

Sustained improvements in education are impossible to achieve without improving the way key institutions in the sector function and increasing parental involvement in decisions affecting their children’s education. Many countries with poorly performing educational systems suffer from institutional weaknesses, including low management capacity, nontransparent resource allocation and accounting practices, and substandard human resources policies and practices. Incentive structures that fail to reward good performance create and reinforce the most deleterious characteristics of weak institutions.

Parents who are well informed of policies and resource allocations in the education sector and involved in decisions regarding their children’s schooling exert considerable influence and contribute solutions. Involved communities are able to articulate local school needs, hold officials accountable, and mobilize local resources to fill gaps when the government response is not adequate.

Context-specific solutions will, of course, be required to address these challenges. But five specific strategies may help policymakers craft those solutions: creating or strengthening the national commitment to education, improving accountability through local control, improving the quality and availability of the information base, conducting serious evaluations to learn what affects learning outcomes, and strengthening the role of civil society organizations.

Create or strengthen the national commitment to education. Successful education requires a strong national commitment, expressed in the legal and institutional framework as well as in budgetary outlays to the sector. A commitment to compulsory primary education signals that the nation’s leaders place high priority on education as a central pillar of development. It supports a healthy debate about what constitutes education and how it can be funded. Having

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a strong national framework for primary or basic education, though not sufficient for the full set of institutional changes required to accelerate progress, is a necessary condition.

Improve accountability through local control. Institutional problems can be partially addressed through parental and community involvement, which anchors education in the social fabric of the community, fosters demand, and ensures that schooling provides social benefits and economic returns and reflects local priorities and values. This commitment and support are vital to ensuring that schooling remains a priority for parents. Given the opportunity cost of sending children to school rather than to work, such support cannot be taken for granted.

Experiments devolving authority and fiduciary responsibilities to parents and communities have produced encouraging results. Evidence from around the world suggests that greater school autonomy—that is, greater parental and community control—leads to higher teacher attendance. Studies in Argentina, Brazil, Chile, El Salvador, Nicaragua, Honduras, Mexico, Nigeria, Peru, and a number of Indian states link reduced absenteeism to parental, community, or school leader involvement (Vegas 2002; Gaynor 1998; Gershberg and Winkler 2000; Pandey 2000; PROBE 1999; Alcazar and others 2004; Chaudhury 2004).

Oversight and authority by parent-teacher associations or parent councils bolstered student test scores in Argentina, Brazil, Nicaragua, Honduras, India, and Indonesia, and it reduced drop-out and repetition rates in a subset of these (Eskeland and Filmer 2004; Paes de Barros, Mondanca, and Soares 1998; King and Ozler 2001; Di Gropello and Marshall 2004; PROBE 1999; Pandey 2000; Alatas and Filmer 2004). In an analysis of 10 Latin American countries, parental participation had the strongest impact on student achievement, while greater community control without parental involvement was only marginally important (Gunnarsson and others 2004).

Improve the quality and availability of the information base. Information is an essential element in local control and accountability. Parents and school administrators need information about the effectiveness of their local schools. Simple indicators of relative performance—spending per child, preparation of teachers, educational outcomes compared with other schools—are essential. Such information is generally unavailable to parents, particularly the parents who are most likely to be faced with failing primary schools.

The State of Parana in Brazil has done a good job of providing parents with the information they need by introducing the *boletim da escola*, an annual school report card of the performance of each of the primary and secondary schools under its jurisdiction. The report cards seek to increase accountability of schools and government to the community. The report cards help the com-

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system**

munity, the government, and the school adopt a shared vision of universal primary education; they empower parents to participate in the education process; and they inform decisionmaking at all levels.

At the national level, data are required for planning for the education sector as a whole and determining how it meshes with macroeconomic policies. Good data and program evaluation also are essential for designing and assessing the cost-effectiveness and impact of a range of investments and interventions. While the degree of centralization of the education sector varies across countries, all countries require sound national data for their sectorwide plans. UNESCO's Institute for Statistics has identified a number of data system deficiencies and is working systematically to address shortcomings in the collection and reporting of data on enrollment and completion.

Conduct serious evaluations to learn what affects learning outcomes. Enrollment and completion indicators are not necessarily good or consistent predictors of outcomes, as a study of six African nations reveals. Kenya had the lowest completion rate, at 63 percent, but 65 percent of its sixth grade students achieved minimum literacy skills—a better outcome than in any other country. Malawi's completion rate was almost identical to Kenya's, at 64 percent, yet only 22 percent of its sixth grade students could demonstrate minimum literacy skills (Ellis 2003). Instituting systems for assessing the acquisition of skills and knowledge, based on international standards, and disseminating the results in a transparent way at both the national and local levels is essential.

Strengthen the role of civil society organizations. Civil society organizations play a major role in advocating for children and parents and in holding local and national governments and international organizations accountable to their commitments. They engage in both advocacy and service delivery. They are particularly effective in community participation, empowerment, literacy, community schools and development centers, reproductive health, and early childhood education (UNESCO 2001). Civil society organizations should be recognized as legitimate participants in debates about the direction of the education system.

How much will it cost to achieve universal primary education?

Achieving universal primary education will cost much more than is currently being spent by developing country governments and the international aid community. How much more varies from country to country and depends on the assumptions on which cost estimates are based.

Recent studies by UNICEF (2001), UNESCO (2003), Oxfam International (2002), the Global Campaign for Education (2003), and the World Bank (Sperling 2003) estimate that putting every child in the world in a good-

Recurrent costs, rather than capital investments, represent the bulk of required funds

quality primary school would cost \$7–\$17 billion¹ a year. The range of estimates is huge, but even the high estimate probably understates the full costs of the expansion, quality gains, and special programs, including subsidies to poor households, that are critical if all children are to complete primary school. These estimates also omit the cost of some expansion of opportunities for post-primary schooling, without which it is unlikely that all parents will see the value of having their children complete primary school.

These studies share several findings. First, they all conclude that recurrent costs, rather than capital investments, represent the bulk of required funds. Second, although the incremental costs are large, all conclude (or perhaps assume) that countries will finance a significant share from domestic resources. UNICEF, for example, assumes that countries will increase education spending by 1.1 percent a year between 2000 and 2015. Bruns, Mingat, and Rakotomalala (2003) show that if all low-performing countries matched the fiscal effort of those countries making the fastest progress in education, even low-income countries might cover 60 percent of the incremental costs—and 80 percent of the total costs—of achieving the Goal.

Third, differences across countries and regions are extremely large in terms of the affordability of reaching universal primary enrollment as well as the external financing needs. In Sub-Saharan Africa external aid will have to play the largest role, because most countries have a long way to go to meet the Goal and the capacity to mobilize domestic funds is limited. According to one estimate, African countries will need 76 percent of the total donor resources required (Bruns, Mingat, and Rakotomalala 2003). In Ethiopia, Tanzania, and many other Sub-Saharan African countries, reaching the Goal will require very large increases in external aid, even with a doubling or tripling of domestic primary spending. Some reallocation of donor funding will be necessary, as currently just 33 percent of donor resources for basic education go to Sub-Saharan Africa. Fourth, the range of estimates partly reflects different assumptions about the quality of programs and the extent to which some countries introduce institutional reforms and policy adjustments that could reduce costs while extending opportunities. The timing and depth of politically delicate steps to make systems cost-effective will greatly affect costs.

Even if developing countries increase their spending on education by more than 1 percent a year, the funding gap will be large. If progress is to be made, this gap will have to be filled by external financing. Bilateral and multilateral donors contributed about \$1.2 billion in external assistance for basic education in 2001–2002. The Global Campaign for Education estimates that at least \$10 billion in external financing will be needed, and even this figure may underestimate the full cost, because some of the additional students who complete primary school will go on to secondary school.

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Bold political leadership is needed in a compact between developing countries and donors

Providing tens of millions of additional children with access to primary school and to a good-quality education requires much more than additional financing. It requires bold political leadership, in both the developing countries and the rich donor countries.

This leadership can and must be forged in the context of a global compact, in which the roles and responsibilities of developing countries and donors are clear and mutually agreed upon. That clarity must then be translated into specific targets and benchmarks set by individual countries, with clear commitments from donors as a group to the ongoing financing of countries' progress. Under the compact, each side is accountable to the other for doing its part. Donors make a serious commitment and respond to countries that are doing things right, assured that external resources are being used well. Developing countries take on tough political reforms in their systems with the confidence that they will have sufficient and predictable financial support to deliver on promises made to their own citizens.

In 2002 donors took the first steps in addressing problems in the education sector. Under the umbrella of the Education for All Dakar Framework for Action, they worked with officials from developing countries to set up a Fast Track Initiative. That initiative seeks to achieve universal completion of primary school in a selected set of countries in which leadership and commitment to education have already produced visible progress. The Fast Track Initiative emphasizes greater donor coordination and focuses on broad sectoral support of national education plans. Perhaps more important, it has the potential to introduce an entirely new approach to donor financing—namely, financing that is predictable for the next decade as long as countries are making progress against mutually agreed upon benchmarks that have been set out by the country's leadership, publicly discussed, and made fully transparent and visible. Key to this approach is the provision of predictable financing linked to steady progress toward pre-agreed benchmarks.

Predictable financing would give leaders of developing countries the confidence to take on politically risky reforms. It would invite long-term investments in expanding teacher training, incorporating programs of auditing and expenditure monitoring into education systems, testing the effects of block grants to communities and of giving communities more control over teacher hiring, developing targeted programs of cash subsidies to poor households contingent on their keeping children in school, and so on. It would also permit countries that are too poor to cover the incremental recurrent costs of their new investments to do so.

The Fast Track Initiative is premised on the notion that donors need to be held accountable for their financial commitments, that national leaders need

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to be accountable for reforming their education systems, and that financing and reforms have to go hand-in-hand. By rewarding ambitious country-level reforms with equally ambitious increases in donor assistance, the Fast Track Initiative has the potential to create strong incentives for country effort. It is the world's best chance for rapid progress in the poorest countries toward the education goals.

Additional and predictable resources—while not a solution alone—are critical in maintaining quality when developing countries eliminate tuition and other fees or expand postprimary schooling. Without additional resources those welcome changes in the past have led to overcrowded classrooms and acute teacher shortages, undermining the credibility of political leaders and the confidence of parents in the value of schools. At the same time, financing that is tied to agreed upon benchmarks can provide donors with the opportunity to engage with national governments in defining the concrete outcomes that constitute progress, rather than wrangling over the specifics of reform and institutional change, which ultimately make a difference only when they are shaped by the countries themselves.

What can developing countries do?

The major work to achieve universal primary education is in the hands of developing countries. They can draw on lessons from a track record of remarkable success in many countries. They can also learn from the emerging evidence on problems with management, performance, and incentives, which will be solvable only by making hard choices and taking political risks. Actions are required within the education sector as well as in the broader political and economic policy environment.

What can donors do?

Donors and international technical agencies can support positive and progressive change by strategically increasing their level of financial commitments and by improving their policies and practices. The report proposes four recommendations for donors:

- Display bold political leadership and make firm financial commitments to make Education for All and the Fast Track Initiative work.
- Reform the donor business. Commit new funds in a new way: through a strong, coordinated global effort that rewards and reinforces countries' measurable progress.
- Report on donor commitments and actions through a transparent accountability framework.
- Invest in genuine evaluation of education sector interventions.

**The G8 nations
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substantial
portion of
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financing
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several years**

Recommendation 1: display bold political leadership and make firm financial commitments to make Education for All and the Fast Track Initiative work

In 2005 the G8 leaders should issue a major statement supporting global education with serious contingent commitments. The more than 30 separate donors and international agencies working on education should come forward with their existing commitments for countries already selected for the fast track, and they should announce their expected future commitments for additional countries to provide the certainty and predictability necessary to inspire countries to embark on strong Education for All plans. The expected resource needs (estimated by the Fast Track Initiative Secretariat), expected funding commitments, and actual disbursements should be made public.

Seven countries—Burkina Faso, Guinea, Guyana, Honduras, Mauritania, Nicaragua, and Niger—were endorsed for Fast Track financing in 2002. The Gambia, Mozambique, Viet Nam, and Yemen were endorsed in 2003, and Ghana was endorsed in 2004. All 12 countries have prepared education plans, but financing remains elusive. What is lacking are firm and predictable donor commitments for funding in the next several years for specific countries tied to specific country plans with agreed upon benchmarks of progress. What is needed is an upfront commitment now from donors, quick action to come to agreement on country plans and benchmarks, and the roll-out of initial programs. Donors also need to commit now to sustain their financial support beyond the next few years, to adjust their support in line with progress, and to add to that support as they develop similar agreed upon programs with additional countries through 2015.

If the international community is serious about reaching the educational Goals, massive funding—on the order of spending on HIV/AIDS—needs to be committed; the paltry sums currently committed to basic education will not help most countries meet the Goals. Although HIV/AIDS funding still falls short of its ultimate needs, billions, not millions, of dollars are committed. Without a similar shift in scale, the gap in education financing cannot be closed. Donors should immediately come forward with bold, firm, and monitorable commitments to the Fast Track Initiative, at a minimum pledging steady annual increases from their current level of official development assistance for education. Together the G8 nations should be able to mobilize a substantial portion of the external financing needed over the next several years.

The processes for funding proposals, the planned approach to meet the policy challenges, and gaps in funding need to be specified and made public. While flexibility is desirable, the nature of the process requires some standardization and transparency. The Secretariat of the Fast Track Initiative should make these processes and agreements public. Doing so entails engaging with civil society, both generally and within countries, to ensure harmonization and

**Donors need to
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inclusion of all players. Greater transparency would provide clarity for countries interested in participating in the Fast Track Initiative. Given the confusion at the start, such efforts deserve more attention now.

Recommendation 2: reform the donor business

The Fast Track Initiative will not work unless donors complete the difficult process of reforming the way they commit and disburse funds. Donors need to work together to support country-driven programs rather than compete for the limited time, attention, and own-country funds to support “their” projects.

Donors also need to make their expectation of performance clearer. As a result of vagueness about what they expect in terms of policy and efficiency reforms, the process has not come close to the momentum needed for real progress toward the Goals.

Donors also need to make genuine commitments of sustained and predictable funding. Failure to do so has prevented countries that have worked hard to develop plans from pursuing major access and quality reforms.

Donors need to take the lead in working with the Fast Track countries, country by country, on a planned trajectory of financing tied to agreed upon benchmarks of progress. To do so, donors need to change their way of doing business. They need to pool the financing of their country’s own education plans, finance recurrent costs as well as new investments, and provide adequate support for long-term capacity building (with benchmarks measured in terms of intermediate outcomes, such as placement of recently trained local education budget managers or school directors). Whether it be through a lead donor in each country or in coordination, donors then need to sign on to the financing cum progress that can form the heart of a country compact.

Recommendation 3: use a transparent accountability framework for reporting

Under current reporting arrangements, it is extremely difficult to track and account for donor spending in education. Much aid is in nonmonetary form (in-kind contributions, technical assistance), and the difference between the amount allocated in a foreign assistance budget and the amount that gets to the ground level for program inputs is large. To date no system has been developed that allows the international community to determine whether spending by particular donors is or is not filling the gap between what is needed and what national governments are able to provide. Similarly, there is no system for reporting on whether policies and practices correspond to current imperatives and agreements on donor harmonization.

The Fast Track Initiative can play an important role in this regard. Proposals for an explicit donor accountability framework are on the table but have yet to be implemented.

There is an urgent need to better understand how well specified interventions and reforms work to increase enrollment, retention, and learning

The report offers three recommendations:

- Donors should invite civil society organizations and developing country governments to participate in reviewing the proposed framework for donor accountability. If warranted, the instruments should be modified to increase transparency and policy relevance.
- Donors should commit in writing to report under the accountability framework and to do so annually.
- Information from donors should be maintained on the Web site of the Fast Track Initiative Secretariat, reported in the Education for All Monitoring Report, and widely publicized.

Recommendation 4: invest in genuine evaluation

Given the volume of national and donor resources devoted to education, there is an urgent need to better understand how well specified interventions and reforms work to increase enrollment, retention, and learning. This can be done only if those responsible for setting spending priorities insist on a sound evidence base and help fund the generation and analysis of relevant data. Several recent examples (including the Progres/Oportunidades program in Mexico and small-scale school health interventions in other countries) attest to the feasibility and potential for policy impact of rigorous evaluation. Multilateral banks, including the World Bank, require that 1 percent of all loan proceeds be used for evaluation. All donors should adopt such requirements. Just as important is ensuring that these resources are applied to evaluation programs that use sound methodologies. Too often the policy value of evaluations is compromised by weak evaluation design or failure to collect baseline data. Findings must be made public and broadly disseminated, whether they are favorable or not.

One approach to the chronic challenge of evaluating development programs is the creation of an independent facility for funding and bringing visibility to the results of rigorous impact evaluation. This facility, which could be supported by foundations and donor governments, would contribute to the global public good of knowledge by making funding available for the design and execution of evaluations for a subset of donor-funded projects. An independent, earmarked source of funds could eliminate or reduce the tension between implementation and evaluation that has hampered evaluation initiatives within donor agencies. In addition, an independent facility would have the ability to disseminate evaluation findings and make available evaluation data in a way development agencies are unlikely or unable to do.

An independent facility is unlikely to be created overnight; many questions of governance and practice would need to be worked out, and donors would have to play a role in the facility's governance. In the meantime because research independence in designing and carrying out evaluations is so important, agencies should work together in some form of consortium that could

With more than 100 million children currently out of school, heroic efforts, not “more of the same,” will be needed to achieve the Goals

help ensure the rigor and independence of evaluations, no matter which donor is supporting the program in question. Such a collaborative effort also could bring more visibility to the results of rigorous impact evaluation.

The report proposes two recommendations:

- Donor agencies should increase their investment in rigorous impact evaluation, with an emphasis on measuring learning outcomes. The results of the evaluations should be made widely available through electronic and other means.
- Donor agencies should assess the feasibility of establishing a mechanism for independent evaluation of donor-supported interventions and create a pooled trust fund and quality assurance mechanism to support rigorous impact evaluation of education sector projects and programs, and widespread diffusion of results.

Conclusion

With more than 100 million children currently out of school, heroic efforts, not “more of the same,” will be needed to achieve the Goals. If the strategy taken by donors and developing country governments is simply to expand the existing education systems as quickly as possible by providing more financial resources, history strongly suggests that countries with relatively low levels of primary school enrollment and completion today will be in roughly the same situation in 2015, ready for the next round of international goal setting. If, however, the global community views this challenge as an opportunity to take a new, creative, and transformative approach to thinking about both education and the relationship between donors and poor countries, success is possible, not just within education but in broader social and economic outcomes as well.

This report suggests several potential levers for transforming (rather than just expanding) education systems. Systematic consultation with expert groups, civil society representatives, policymakers, and other stakeholders may reveal other, better levers. The point is not to define a closed and universal list—all genuine solutions must come from locally defined processes—but to be clear about the need to identify specific actions that induce a fundamental reorientation in failing education systems.

1

Setting the stage

The task force's contribution

How can the international community reach the global goal of universal primary education and gender parity in education? This question is the focus of two of the Millennium Development Goals endorsed by world leaders at the UN Millennium Summit in 2000 (see Goals on p. xviii).

The UN Millennium Project Task Force on Education and Gender Equality, an expert advisory group commissioned by the UN secretary-general, was assigned to take a systematic look at how dramatic improvements in education can be achieved in the developing world. The task force, one of 10 under the auspices of the Millennium Project, was charged with developing recommendations for the international community about how to achieve the Goals.

The urgency of the task force's work is brought into stark relief by the reality that many countries will miss the 2005 Goal for gender parity in primary education. If there is to be any chance of meeting the 2015 Goals, both developing country governments and the broader international community must dramatically step up the level and nature of financial, political, and technical commitments.

The membership of the task force is diverse. Its members include presidents and directors of nongovernmental organizations in India, Nigeria, Senegal, the United States, and Zambia; leaders of activist groups in the Dominican Republic and Kenya; scholars in Luxembourg, Mexico, Senegal, the United Kingdom, and the United States; parliamentary and government officials in Brazil, Nigeria, and Uganda; and senior staff and sectoral experts of the United Nations Development Programme (UNDP), the United Nations Children's Fund (UNICEF), the United Nations Development Fund for Women (UNIFEM), the United Nations Educational, Scientific and Cultural Organization (UNESCO), the International Labour Organization (ILO), the World

Food Programme (WFP), the Inter-American Development Bank (IDB), and the World Bank.

To give adequate attention to both the gender and education Goals, the task force divided its work into two parts, with members focusing on one or both of the Goals, depending on their backgrounds and interests. Two complementary reports were prepared—this one on education and a companion report on gender equality (UN Millennium Project 2005b). Work on that report was led by Geeta Rao Gupta and Caren Grown at the International Center for Research on Women.

Task force methods

Between August 2002 and September 2004 the task force reviewed the literature on education in low- and middle-income countries, including both academic and official sources. It also commissioned new analytic work to explore topics that had not been adequately addressed (see appendix 1 for the list of commissioned papers). Task force members met four times to discuss findings and recommendations. The task force also conducted an electronic consultation with civil society organizations to obtain broad feedback on an earlier version of this report. (See appendix 2 for the summary of the e-consultation.)

Audience and organization of the report

The task force defined three main audiences for its report: policymakers in developing countries who are responsible for ensuring that the right to education is fulfilled; decisionmakers in donor countries and in international agencies on whom external financing depends; and parents, citizens, civil society, and leaders at the local, national, and international organizations who are dedicated to better education for the world's children.

Part 1 of the report sets the context for the report's messages and recommendations. It presents the overall perspective of the task force, a brief history of goal-setting in international education, and information about progress toward achievement of the Goals.

Part 2 addresses the issues and challenges of education in developing countries. It sets out four key strategies for accelerating progress and highlights the implications of the strategies for the institutional and other changes needed if the Goals are to be achieved. Part 2 is meant to present a menu, based on steps that have proven effective, which politicians, policymakers, civil society, and citizens in the developing world can use to forge their own priorities and craft their own strategies for the next decade, given their domestic and external resources and their institutional realities.

Part 3 examines an international compact between donors and developing countries, on which achievement of the education goals by 2015 depends. This compact will be realized only when it is made concrete at the country level—with predictable external financing from donors that flows in line with agreed

on and demonstrated progress in countries. This part of the report sets out the task force's recommendations to the donor community in the context of such a compact.

The contribution of the task force

Many public and private organizations have made, and continue to make, major contributions to our understanding of the shortcomings of education systems in the developing world and actions to improve the situation. Analysts and advocates alike shine bright lights on the problems of access to schools; the quality of instruction; gender-stereotyping in curricula; and safety, health, and nutrition problems that limit children's ability to attend school and receive a good-quality education. Dozens of reports have been written on topics ranging from the quality of education data to trends in gender parity and the effectiveness of school feeding programs. The task force seeks to benefit from those efforts but duplicate none of them.

Instead, the task force sees this report as a way to communicate specific findings and recommendations that members believe are both supported by the balance of the evidence and essential to achieving the required level and pace for universal primary school completion by 2015.

The task force supports the international agreements that give every child the right to a good-quality education—a right established in multiple global accords and codified in many countries' constitutions. The task force also believes that better education is fundamental to the prospects for economic and social development and is a key input into the achievement of most of the other Goals (box 1.1). For this reason, when hard choices are made about allo-

Box 1.1 **How education** **affects** **achievement of** **the Millennium** **Development** **Goals**

Source: Herz and Sperling
2003.

- *Poverty reduction:* Over the medium run, poverty reduction depends on economic growth. No country has ever achieved continuous and rapid growth without achieving an adult literacy rate of at least 40 percent. Wages and farm income almost always increase with education. The higher productivity these income gains reflect can contribute to national economic growth.
- *HIV/AIDS:* Women are now the principal victims of HIV/AIDS in poor countries. Education helps women protect themselves, both by informing them about the disease and by making them more effective in asserting their reproductive and sexual rights. Young people (15–24 years) who have completed primary education are less than half as likely to contract HIV as those with little or no schooling.
- *Maternal mortality:* Women with six or more years of education are more likely to seek prenatal care, assisted childbirth, and postnatal care, reducing the risk of maternal and child mortality and illness.
- *Child health:* Educated mothers are 50 percent more likely to immunize their children than mothers with no schooling.
- *Hunger:* Most farmers in the developing world are women. Educating girls and women leads to more productive farming and accounted for more than 40 percent of the decline in malnutrition achieved between 1970 and 1995.

cating scarce resources, education should be privileged, as long as the resources can be used in ways that improve the acquisition of knowledge and skills by a larger number of children. This report highlights and promotes actions that will increase the effectiveness of existing and additional resources.

Education and society: multiple benefits, unrealized potential

The challenge of achieving the education Goals is both central to and strongly influenced by the social and economic context. For this reason, this report focuses on the investments and institutional changes required to transform education systems in developing countries and on the role of the international donor community in supporting countries' own transformations. This chapter focuses on the larger context, to emphasize a key message: the education system cannot do it alone. Success in improving education requires tremendous political leadership and commitment by citizens, civil society leaders, bureaucrats, politicians, parents, and many others outside the education system.

Education is society's main instrument for reproducing itself and can be a key ingredient for social change

Education is about much more than children sitting in schools, acquiring skills that can be objectively tested. Both the inputs to and the outputs from education are far more complex than much of the usual international discourse suggests. Typically, the inputs to education are described in technical terms, such as the optimal pupil to teacher ratio or the availability of textbooks and chalk. Outputs are often described in economic terms, including the higher incomes associated with each additional year of education.

But because education is first and foremost the vehicle through which societies reproduce themselves, both the inputs and the outputs in an education system may more rightly be thought of as a set of ideas about how a society is structured and should be structured in the future. This means that the concept of providing every child with a good-quality education is not simply a function of having enough schools, textbooks, and teachers. It is very much a result of a social context in which education is seen as a right for all and in which all

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people have the opportunity to improve their economic and social welfare and participate in public life.

Decisions affecting what is taught, who is taught, and how people are taught are part of the process of social reproduction. With respect to what is taught, the leading figures within one generation transmit to the next generation their understanding of history and the essential skills, knowledge, and beliefs for the perpetuation of the society. At the technical level, this translates into the content of the curriculum, the standards for progression to the next grade, and so forth, but it is never completely removed from the much broader (and often highly politicized) context. With respect to who is taught, policies and practices related to resource allocation, placement of schools, the scope for private sector involvement, and overt or invisible barriers to access lead to outcomes that can either reduce or reinforce social stratification. With respect to how people are taught, the methods and practices in education are also means of communicating the ways in which societies are structured and should be structured in the future. Observable features of a school system—schools, teachers, school fees—are a function of broader social phenomena.

Explicitly recognizing the social reproduction objective of education helps explain the painfully slow progress toward full expansion of education and gender parity in some countries and the troubled history of many of the reform efforts that have been undertaken to increase and democratize access to educational opportunities. The evidence from too many countries is that without a concerted policy to the contrary, current education systems reinforce rather than compensate for existing inequalities: the children of the rich acquire more education than the children of the poor. Greatly increasing access to good education, which almost always means making societies more inclusive and egalitarian, is not necessarily the result desired by those with the power to make decisions. Education systems can be part of a vicious cycle, locking out generations of the poor. Changing those systems requires political leadership and institutional reform, as well as additional investments and inputs.

Given the intangible function of education in social reproduction, “solutions” to shortcomings in the education system cannot be mechanistic, nor can they easily be transferred from place to place. Insufficient education of inadequate quality cannot be effectively addressed solely by “business as usual,” that is, expanding existing systems and increasing spending on books, teacher training, and other inputs. It requires something more: changes in the incentives and institutional arrangement in the education sector that emphasize accountability to parents and communities for children’s learning. The potential for complementary systemic change in society as a whole is much greater in settings in which political and social leaders are committed to strengthening democratic institutions and to empowering parents and citizens to demand accountability in their political systems as well as in their schools.

**Educating the
poor triggers
broader social
change**

A transformed education system can also be a key ingredient for change. The recommendations in this report reflect evidence on policies and practices that are most likely to trigger that kind of transformation, starting a virtuous cycle in which better access to and quality of education lead to a new social equilibrium.

Educating the poor is particularly important for triggering broader social change. Education has a special quality: the human capital acquired through formal education cannot be expropriated. In that respect it is different from land or financial assets. Education is an asset that enables its owner to earn more and to communicate and obtain information more successfully. Education that reaches the poor can contribute to a more equal society, in which power is more broadly shared, and to a more equitable pattern of growth—one that is more likely to reduce poverty. In turn, a more equitable sharing of economic and political power will prevent the concentration of wealth and power that in some societies is still associated with limited access to education for the poor (Birdsall 1999; Birdsall and Londoño 1997).

Education is an end in itself and has tremendous benefits for individuals and society

This report is grounded in the recognition inherent in the goal of universal education that access to basic education is an end in itself, a human right, and a vital part of individuals' capacity to lead lives they value. In addition, it is an important instrument with which people can improve their lives in other ways. For example, more education, particularly of women, is strongly associated with better family health and improved capacity to plan and time births. Education also enhances the capacity of poor people to participate in the political process and thus to organize for other social and political rights and to demand governments that are more representative and accountable.

Better educated people earn more, not only or primarily because they are better credentialed but also because they are more productive. Wages of educated workers are higher, as are earnings of farmers in settings in which education helps them take advantage of new seed and other technologies (Jamison and Lau 1982). Earnings of educated small business owners and other self-employed workers are also higher (T.P. Schultz 1993, 2001; T.W. Schultz 1963).

Wage returns to education vary by level and differ across economies. In most developing economies the private wage returns to higher education are very high relative to private returns to primary and secondary education. In growing economies this often reflects the fact that the demand for educated workers exceeds the supply, especially for university graduates, because educational opportunities are still limited. It also reflects the fact that those who achieve higher levels of education probably benefited at lower levels from higher quality schooling, which enabled and encouraged them to continue

and which ensures that they have more of the human capital that makes them more productive.¹

A workforce that is more skilled and has more knowledge also contributes to higher economic growth. When actual learning is measured, performance by secondary students on internationally comparable math and science tests is positively correlated with economic growth (Hanushek and Kinko 2000).²

Private returns to education are not confined to higher wages and incomes. Independent of their household income, mothers with primary education have better access to the information they need to help keep their children healthy. Education, particularly girls' education, has social returns to society at large as well, since society captures some of the benefits of improved health, lower fertility, and the at-home education that educated mothers transfer to their children (box 2.1).

Box 2.1
Educating girls
yields broad
benefits

Girls' education is strongly associated with better welfare at the individual, family, and social levels. It is a central means to break the intergenerational transmission of poverty.

Educated mothers are more likely to send their children to school, a key to breaking the cycle of intergenerational poverty (Filmer 1999; World Bank 2003; UNICEF 2004b).

- In Pakistan mothers' education is the single strongest determinant of schooling for their children, especially for girls (Sathar and Lloyd 1993).
- In Peru mothers' education increases girls' school enrollment as much as 40 per cent more than fathers' education (Herz and Khandker 1991).

Women's income benefits children.

- In Guatemala it takes 15 times as much spending to achieve improvement in child nutrition when income is earned by the father rather than the mother (World Bank 1993).

Educated mothers get married later and have fewer children. With reduced fertility, mothers can concentrate more attention on each child, and they can afford to send their children to school.

- An extra year of schooling for girls reduces fertility rates by 5–10 percent. In Brazil and Peru women with no education have about six children, while women with a secondary education have about three (Herz and Khandker 1991).
- In Africa women with seven or more years of schooling marry five years later than women with no education (World Bank 1993).

Educated mothers have healthier families. Educated mothers access and use beneficial information about health care for themselves and their families and use health services more often.

- Educated mothers have better nourished children, who are less likely to die in infancy. On average one additional year of schooling for a mother results in a reduction in child or infant mortality of 9 per 1,000 (World Bank 1993).

**Education is
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Education that is broadly shared ensures that growth itself will be broadly shared. Education that reaches the poor, women, and marginalized ethnic groups brings private benefits to them as well as benefits to society as whole by reducing inequality, diminishing discrimination, and creating more cohesion in the long run.

The benefits of education are conditioned by the context

Education is a potential catalyst for broader change, but its power is conditioned by the political, social, and economic context. This is most obvious in the case of the economy. Schools and education systems in themselves do not necessarily guarantee faster economic growth. High measured levels of education and human capital did not generate healthy growth in the former Soviet Union, nor have rapid increases in average education in Egypt, Latin America, and much of Africa spurred growth in the past three decades.

Where the relationship between “more” education and faster growth has failed to materialize—both within countries and between countries—one or more factors may be responsible (Pritchett 2001). First, “more” education is often assessed in terms of increased public spending on education and higher enrollments. But if education systems are weak, more spending and higher enrollment may not translate into learning and concomitant increases in the human capital stock. Second, even where the human capital stock is increasing, problems in other policy spheres (macroeconomic instability, civil unrest, market distortions) may prevent these gains from being translated into economic growth.³ Third, the effect of education on growth will be minimal if technological progress or some other key complementary factor, such as adequate infrastructure or contract enforcement, is missing (T.W. Schultz 1975, cited in Pritchett 2001). Fourth, as long as the stock of human capital remains below some threshold, marginal increases in education for a few people may be ineffective in producing growth. If one worker cannot read instructions on the factory floor, the abilities of other workers cannot be fully exploited. The deficit of the existing stock in relation to some critical threshold, combined with adverse economic structure and low organizational and institutional capacity, may be one reason why some of the world’s poorest countries seem caught in a poverty trap, emergence from which requires a major development effort across several fronts.⁴

East Asia’s experience over the past five decades suggests the role other factors play in ensuring that education contributes to growth. Educational systems were relatively good, market and other distortions were limited, technology was adapted, and investment in infrastructure and other complementary inputs was high. In this context, education contributed to high and relatively equitable growth (Birdsall, Ross, and Sabot 1995).

The importance of the context means that while education has pride of place among the Goals, other Goals also matter for education; achieving

The effect of economic shocks on education is one of many reasons that leaders in the education sector need to work with their colleagues in finance and planning

the Goals of universal completion of primary schooling and gender parity in schooling depends, in particular, on a supportive economic environment. The economy affects both the supply of and demand for education.

On the supply side, stagnant economies have fewer resources to invest in children's education. The contrast between Latin America and East Asia is instructive. In 1960 educational attainment in the two regions was comparable, and Latin America was, on average, somewhat wealthier. Today the two regions spend similar shares of GDP on education, but East Asia's rapid growth during the intervening decades means that this share comes out of a larger pie. The faster spread of education also led to a rapid decline in fertility, so that spending the same percentage of GDP finances much higher spending per child.

On the demand side, the returns to education are lower in slow-growing economies, thereby blunting incentives to send children to school. In the short run, the effects can be overcome by the kinds of interventions discussed below (such as subsidies to poor families to keep their children in school), but the cost of doing so is higher than it is in economies enjoying healthy growth. One of the explanations for declining or stagnating enrollment ratios in Sub-Saharan Africa in the 1980s is that there were fewer jobs for graduates in the private and public sectors. Consequently, private returns to education fell, reducing the incentive to stay in school (Mehrotra and Vandemoortele 1997). In Latin America returns to primary and secondary schooling tend to be low relative to tertiary schooling. Consequently, the incentive to progress through primary school to secondary school is low, except for those who expect to be able to go on to university. The result is a polarized distribution of education and income (IDB 1998; Lopez-Acevedo 2001; Blom, Verner, and Holm-Nielsen 2001).

An example of how the economic context can undermine educational progress is the effect of economic shocks. Low- to middle-income countries are vulnerable to external shocks—be they from a sudden decline in the price of a commodity like coffee (on which Nicaragua, Uganda, and other very poor countries are highly dependent) or a global financial crisis like the one that hit Latin America and East Asia in the 1990s, cutting off credit and raising the prices poor urban consumers face. External shocks hit schools and poor families hard. Even if governments manage to maintain spending on teacher salaries, spending for books and school meals may be withdrawn. These shocks force many families to take their children out of school to save the cost of uniforms and notebooks and to put them to work in the fields or the streets (box 2.2).

The effect of economic shocks on education is one of many reasons that leaders in the education sector need to work with their colleagues in finance and planning. The effect of shocks cannot be offset by the education system itself. Governments need to be able to increase domestic spending on safety net

The social context in which educational opportunities are increased for girls and women also affects the extent to which they benefit from that education

programs (that is, programs that help the poor keep their children in school) or to quickly access external financing.

Education is also critical for empowering women. Educated women become more effective agents, able to improve both their own well-being and their families' welfare. They are better equipped to extract the most benefit from available services and existing opportunities and to take advantage of alternative opportunities, roles, and support structures. These empowering effects of women's education are manifested in a variety of ways, including increased income-earning potential, ability to bargain for resources within the household, decisionmaking autonomy, control over their own fertility, and participation in public life.

But as is the case with economic benefits, the social context in which educational opportunities are increased for girls and women also affects the extent to which they benefit from that education. The benefits for women are strongly conditioned by a number of factors, including the level of economic development, the depth of the labor market and, in particular, the degree of gender stratification. The impact of women's education is greater in settings that are already relatively egalitarian. Under such conditions, even modestly educated women are more likely to participate in important family decisions, to work in nonfarm occupations, and to control economic resources (Malhotra, Pande, and Grown 2003).

In areas that are more gender stratified, women are far more likely than men to be denied access to resources and prevented from exercising their own autonomy. In these settings, education alone will not be transformative in ensuring women's full participation in economic, social, and political unless other normative shifts and changes in power relations also take place. In coun-

Box. 2.2
Macroeconomic shocks have profound effects on education

School attendance and literacy rates decline during macroeconomic crises. Secondary school enrollment in the Philippines increased only 0.9 percent between 1997/98 and 1998/99, after growing at an average annual rate of 2.6 percent the previous five years (World Bank 2000). In Mexico the dropout rate in rural areas rose 40 percent during the debt crisis of the 1980s. In Argentina and Mexico growth in gross primary enrollment slowed in 1995 following the Latin American debt crisis, which caused poverty and inequality to rise (Lustig 2000; World Bank 2000). In South India children are taken out of school in response to adverse shocks (Jacoby and Skoufias 1997).

Economic crises increase transitory poverty (Jalan and Ravillion 1997; Gaiha and Deolalikar 1993). They can also increase persistent or chronic poverty, by causing hard-to-reverse effects on the human capital of poor people. In Indonesia the drop-out rate in the lowest fourth of the income distribution rose from 1.3 percent in 1997 to 7.5 percent in 1998 among students 7–12 and from 14.2 percent to 25.5 percent among students 13–19. The proportion of poor children not enrolled in school increased from 4.9 percent to 10.7 percent (Lustig 2001).

**Attaining major
improvements
in education
requires good
economic
policies and
progress on
gender equality
outside of
the education
system**

tries such as Kuwait and Saudi Arabia women are well educated, but they nevertheless lack opportunities for employment or participation in public life.

A good example of the effect of the broader context on the benefits of education is fertility. Increases in women's education are associated with declines in fertility around the globe. But how much education is needed to achieve an effect? A review of 59 studies from many different countries found that the level of women's education associated with a 10 percent decline in the fertility rate varies with the degree of gender stratification. In the most inequalitarian settings, the gap in schooling between boys and girls is also greatest (Jejeebhoy 1996).

Recent research shows a link between macroeconomic downturns and education indicators. The average annual increase in years of schooling in 18 Latin American countries fell from 1.9 years in the 1950s and 1960s to 1.2 in the 1970s and 1980s. Worsening macroeconomic conditions (short-term GDP shocks, volatility, and adverse trade shocks) explain 80 percent of the decline, according to one study (Behrman, Duryea and Székely, 1999). As evidence from Mexico shows, the negative "income effect" of falling income tends to outweigh the positive "price effect" of the lower opportunity cost of attending school (Binder 1999). Simulation results suggest that the gross secondary enrollment rate in Mexico would have been 11 percentage points higher in 1991 if the economy had grown during the 1980s at half the rate of the 1970s.

The clear links between the economic and social context, including the demand for skilled labor and the degree of gender stratification, suggest that attaining major improvements in education requires good economic policies and progress on gender equality outside of the education system. It is difficult to imagine major change occurring without improvement in education performance. But countries cannot depend on the education system alone to be the engine of economic, political, and social change.

Does this mean that education sector performance depends entirely on matters out of the hands of those responsible for education policies and programs? No. What it means is that the achievement of universal primary education must be supported by both positive actions within the sector on the one hand and a progressive political environment and sound economic and social policies on the other. These policies include the policies of developing countries themselves, such as creating safety nets for vulnerable populations. They also include policies and practices of the rich countries, including trading regimes, financial sector stability, and other factors that may seem removed from primary education but are in fact of tremendous importance. Rich countries also have the financial capacity to help finance educational investments in low-income countries and to support countercyclical safety net financing when middle-income countries are hit hard by shocks, an issue addressed in part 2.

The Goals and the history of goal-setting in education

The Goals related to education are closely linked to the Education for All Framework of Action established at the Dakar World Education Forum in 2000. Both were agreed to by major international actors, including the donor community, education specialists, and the technical agencies of the United Nations.

Unlike the Goals, Education for All covers much more than formal primary education. It includes expanding and improving comprehensive early childhood care and education, especially for the most vulnerable and disadvantaged children; ensuring that the learning needs of all young people and adults are met through equitable access to appropriate learning and life-skills programs; achieving a 50 percent improvement in adult literacy by 2015, especially for women, and equitable access to basic and continuing education for adults; and improving all aspects of the quality of education so that recognized and measurable learning outcomes, especially in literacy, numeracy, and essential life skills, are achieved by all.

The Goals and Education for All are part of a long tradition of far-reaching, high-level goals established by UN agencies and other international bodies. Since World War II every 10 years or so an international body has identified achievement of universal primary education across all countries in the world as a goal. The timeframe set for the goal has typically been 20 years. A similar series of goals has been set for gender parity in primary (and higher) levels of education (Clemens 2004) (tables 3.1 and 3.2).

The impact of goal-setting is not obvious, though the repeated calls for progress may have encouraged leaders, parents, and other citizens in developing countries to go beyond whatever efforts they would have made anyway. Certainly trends in public spending, development assistance, and enrollments, all of which follow a long-term, general upward trajectory, were more positive

Table 3.1**International goals
for universal primary
education, 1934–2002**

Source: Multiple sources, cited
in Clemens 2004.

Target year	Approved	Forum
—	1934	International Conference on Public Education, Geneva
	1948	UN Universal Declaration of Human Rights, New York
	1951	International Conference on Public Education, Geneva
	1952–54	UNESCO Regional Conferences on Free and Compulsory Education, Bombay, Cairo, and Lima
1980	1960	UNESCO Meeting of Representatives of Asian Member States on Primary and Compulsory Education, Karachi (Karachi Plan)
	1961	UNESCO Conference of African States on the Development of Education in Africa, Addis Ababa (Addis Ababa Plan)
	1962	UNESCO Conference of Ministers of Education and Those Responsible for Economic Planning, Santiago (Santiago Plan)
	1966	UNESCO Conference of Ministers of Education and Ministers Responsible for Economic Planning in the Arab States, Tripoli
	1970	International Development Strategy for the Second UN Development Decade, New York
2000	1979	UNESCO Conference of Ministers of Education and Those Responsible for Economic Planning of Member States in Latin America and the Caribbean, Mexico City
	1980	International Development Strategy for the Third UN Development Decade, New York
	1990	UNICEF World Summit for Children
	1990	World Conference on Education for All, Jomtien (Jomtien Declaration)
	1993	Education for All Summit of Nine High-Population Countries, Delhi (Delhi Declaration)
2015	1995	Fourth World Conference on Women, Beijing (Beijing Declaration and Platform for Action)
	1996	Shaping the 21st Century, OECD Development Assistance Committee
	2000	World Education Forum, Dakar (Dakar Declaration)
	2000	Millennium Summit, New York (Millennium Declaration)
	2001	Road map for the Implementation of the UN Millennium Declaration
	2002	UNICEF Special Session on Children
	2002	UNICEF Convention on the Rights of the Child

in the past five decades in the developing world than they were in the nineteenth and early twentieth centuries in the now-industrial countries (figures 3.1 and 3.2) (Clemens 2004).

A variety of problems has diminished the usefulness of goal setting. First, much goal setting has been characterized by an imperfect link between the political, or rhetorical, level and the technical level. That is, the feasibility of the goals was not established before the language was adopted. Second, in many cases the indicators chosen have not been the best measures of the concepts of interest. In education, for example, many observers believe there has been an overemphasis on increasing enrollments, with too little attention paid to retention and completion (“survival” through the end of a school cycle) or to the even more important indicator of learning outcomes. Third, global

Table 3.2**International development goals for gender parity in education, 1960–2001**

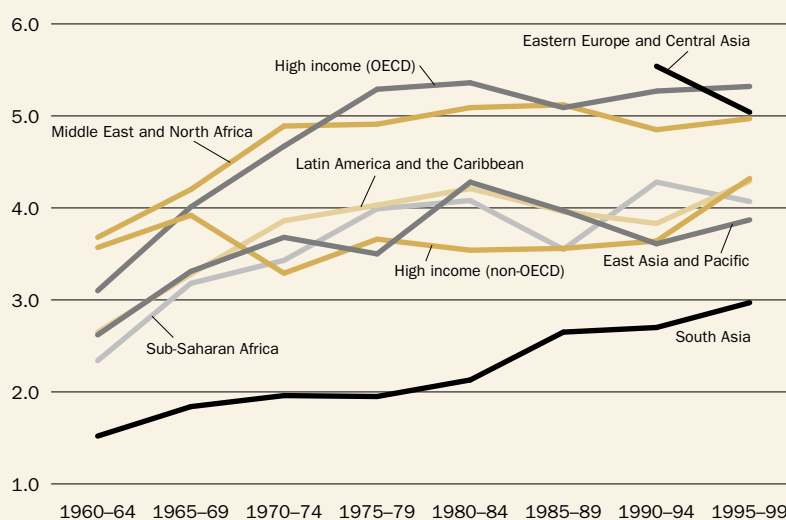
Source: Multiple sources, cited in Clemens 2004.

Target year	Approved	Forum
—	1960	UNESCO Convention against Discrimination in Education
	1967	UN Declaration on the Elimination of Discrimination against Women
	1981	UN Convention on the Elimination of All Forms of Discrimination against Women
1980	1975	World Plan of Action for the Implementation of the Objectives of the International Women's Year, Mexico City
1995	1980	Program of Action for the Second Half of the United Nations Decade for Women, Copenhagen
2000	1985	Nairobi Forward-Looking Strategies for the Advancement of Women Towards 2000
	1993	UNESCO and UNICEF Pan-African Conference on the Education of Girls (Ouagadougou Declaration)
2005	1995	Fourth World Conference on Women, Beijing (Beijing Declaration and Platform for Action)
	1996	Shaping the 21st Century, OECD Development Assistance Committee
	2000	World Education Forum, Dakar (Dakar Declaration)
2015	2000	Millennium Summit, New York (Millennium Declaration)
	2001	Road map for the implementation of the UN Millennium Declaration

Figure 3.1

Public spending on education has risen in the past 40 years, but it varies widely across regions
Percent of GDP, five-year averages, 1960–99

Source: World Bank 2002.



goals that represent a uniform vision of where countries should be headed have obscured the tremendous heterogeneity across countries and regions. For example, at least at the national level, many Latin American countries have already surpassed most of the goals that seem unreachable without major acceleration by many of the poorest African countries (figure 3.3). Fourth, goal-setting in education has tended to focus almost exclusively on expansion of access, particularly through increasing the number of schools and teachers; demand-side constraints of various kinds have generally been ignored. Finally, in both rich and poor countries, agreement by world leaders in a global forum

does not guarantee their commitment once they return home. International goals reflect priorities that may not withstand competing pressures by domestic constituencies.

Despite these problems recent goal setting has led to concrete efforts at the international level. In particular, Education for All set the stage for the establishment in 2000 of the annual publication of the *Education for All Global Monitoring Report* and in 2002 of the Fast Track Initiative, a program designed to mobilize supplementary external funding for national education plans.

Figure 3.2
Bilateral official development assistance for education has risen, too
Share of developing countries' aggregate GDP (%)

Source: OECD Creditor Reporting Service.

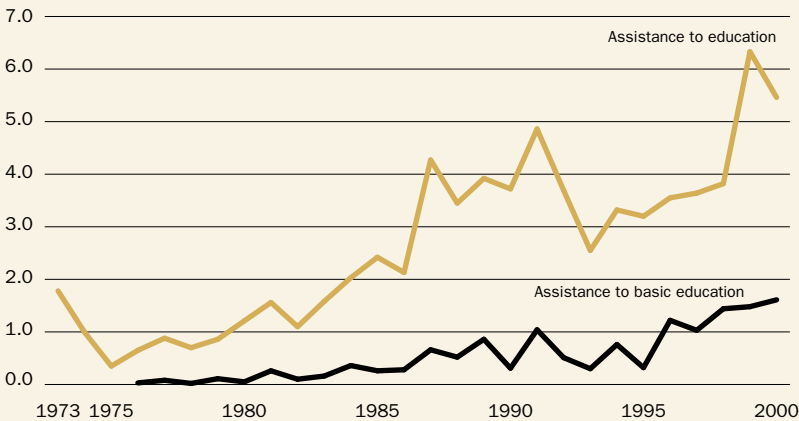
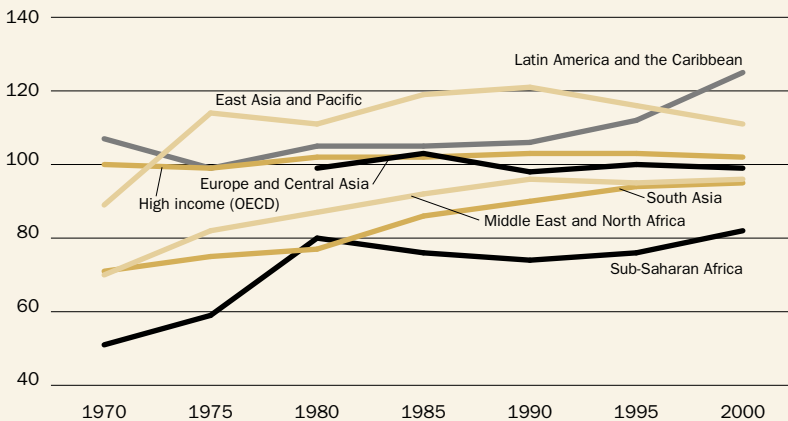


Figure 3.3
Gross primary enrollment ratios have remained fairly static since the 1980s
Gross primary school enrollment (%)

Source: World Bank 2004.



Trends in primary education and gender parity

Recent history may be only a rough guide to the future. But trends in primary school completion and gender parity across the regions of the world are nevertheless instructive in highlighting the greatest challenges.

Global and regional primary school completion rates have improved since 1990, but many countries are far off track for meeting the Goal and gender disparities remain. An (imperfect) indicator of the success of the education system is primary school completion.¹ About 81 percent of children in the developing world—and just 51 percent of children in Sub-Saharan Africa—complete primary school (table 4.1). As far from the Goal of universal primary education as these figures are, they represent important gains since 1990.

World and regional averages obscure the sharp differences in completion rates across countries. Brazil, Cambodia, the Gambia, and Nicaragua registered increases in primary school completion rates of up to 20 percentage points during the 1990s. Elsewhere—in Afghanistan, Albania, Bahrain, Cameroon, the Republic of Congo, Iraq, Kenya, Madagascar, Qatar, the United Arab Emirates, Venezuela, and Zambia—primary school completion declined (Bruns, Mingat, and Rakotomalala 2003).

Around the world primary school completion rates for girls rose substantially in the 1990s, and gender parity is one of the fastest-moving development indicators. Progress has not yet erased a significant differential, however. In the developing world as a whole, 85 percent of boys and just 76 percent of girls complete primary school. Gender parity exists in East Asia and the Pacific, and in Latin America primary school completion rates are actually higher for girls. But in Sub-Saharan Africa, Europe and Central Asia, the Middle East and North Africa, and particularly South Asia, completion rates of girls lag behind those of boys.

Table 4.1
Primary completion
rates, by region and
gender, 1990 and 2000
Percent

Note: Figures are population-weighted averages.

a. For some countries the last available year is 1999.

Source: Bruns, Mingat, and Rakotomalala 2003, based on World Bank database on primary school completion.

Region	1990			2000 ^a		
	Girls	Boys	Total	Girls	Boys	Total
East Asia and the Pacific	92	97	96	98	98	97
Europe and Central Asia	85	95	90	93	95	93
Latin America and the Caribbean	71	64	69	85	81	83
Middle East and North Africa	71	84	78	78	86	83
South Asia	59	77	68	63	84	74
Sub-Saharan Africa	43	57	50	46	56	51
All developing countries	65	79	73	76	85	81

In some countries severe gender disparities in primary completion rates fell during the 1990s only as a result of declines in boys' completion rates. In other countries, including Bangladesh, Tunisia, and Sri Lanka, a variety of policy instruments has increased gender parity. Local programs, such as those in Balochistan Province in Pakistan, have also increased girls' enrollment and completion (see appendix 3).

Gender concerns go far beyond the quantitative indicators of enrollment and completion, however. A wide body of research and practice highlights the lack of gender sensitivity in school curriculum and classroom interactions, in which boys' participation is favored over girls'. Elimination of these differentials, which do not show up in statistics, is critical to achieving true gender parity in education.

A host of factors affect enrollment and retention rates

Although the education and gender parity Goals fail to include an explicit distributional (or equity) dimension, achieving universal primary education requires that progress in access and completion disproportionately benefit poor and otherwise disadvantaged children. These are the children who are out of school or leaving school before they reach fifth or sixth grade, the children for whom educational quality is lowest and support systems at home weakest.

In many developing countries education inequalities across income and ethnic groups are great. Geographic and language barriers also contribute to educational inequalities. Education inequality includes lack of access for specific groups, quality disparity, and inequality of opportunities, which affects completion.

Differences by household income

In every country completion rates are lowest for children from poor households. Moreover, the education income gap exacerbates gender disparities. Girls from poor households register very low levels of completion in many

In some countries the main reason for low educational attainment is that children do not enroll in school

countries (Bruns, Mingat, and Rakotomalala 2003). In India, for example, there is a 2.5 percent difference in the enrollment of girls and boys from the richest households, while the difference is 24 percent for children from the poorest households (Filmer 1999).

In South Asia failure to complete schooling is more concentrated among the poor. In India, for example, 38 percent of children never complete grade 5. Sixty-one percent of these children come from the poorest 40 percent of households. In Latin America a smaller fraction of children fail to complete fifth grade (12–32 percent), but they are disproportionately poor, with more than 70 percent coming from the poorest 40 percent of households. In East Asia, too, children who are out of school are overwhelmingly poor (Filmer and Pritchett 1998).

In Western and Central Africa, the median grade completed by the bottom 40 percent of the income distribution is zero, because less than half of poor children complete even the first year of school. By contrast, the wealthiest quintile has a median of four to six years of completed schooling. In Eastern and Southern Africa, the gap is smaller, ranging between one and three years. The gap between rich and poor is highest in South Asia. India has the largest gap of all—a 10-year difference between the median attainment of the poor (zero years) and the rich (10 years). In Pakistan the difference is nine years. In Latin America the gap between rich and poor is about four years. In East Asia the gap is three years.

In some countries the main reason for low educational attainment is that children do not enroll in school. In Bangladesh, Benin, Burkina Faso, Côte d'Ivoire, India, Mali, Morocco, Niger, and Senegal, more than half of the children from the poorest two income quintiles never even enroll. Low rates of enrollment are a particularly important problem in South Asia. In other countries enrollment may be almost universal, but high repetition and drop-out rates lead to low completion rates. This is a common pattern in Latin America. In both cases, poor students are disproportionately represented among those who fail to complete primary school.

Using household survey data from the Demographic and Health Surveys in 35 developing countries, Filmer and Pritchett (1998) and Filmer (1999) found evidence of differentials in school enrollment and attainment by income levels. They found the following patterns:

- The difference in school completion by income levels is relatively small in some countries and extremely large in other countries.
- In countries with the lowest average enrollment and completion rates (countries in Western and Central Africa and South Asia), first grade enrollment rates are very low among the poor.
- Among countries with high education attainment averages, almost all poor children enroll in first grade. But these children are more likely to drop out of school—after just one or two years of schooling in some

In many countries the rural-urban education gap is the most important factor explaining education differentials

cases. In these countries (including most Latin American countries), completion rates are much lower than enrollment rates.

- Education differentials by income exacerbate gender disparity, especially in Sub-Saharan Africa.

Differences between urban and rural settings

In many countries the rural-urban education gap is the most important factor explaining education differentials. In Mozambique average completion is 26 percent, but rural completion is just 12 percent. The same pattern exists in Burkina Faso, Guinea, Madagascar, Niger, and Togo (Filmer and Pritchett 1998; Filmer 1999).

Girls in rural areas register even lower levels of completion, especially in Sub-Saharan Africa. In Benin, Burkina Faso, Guinea, Madagascar, Mozambique, and Niger primary school completion among rural girls is 15 percent (Bruns, Mingat, and Rakotomalala 2003).

Differences across ethno-linguistic groups

In Latin America indigenous children have lower enrollment rates than non-indigenous children (Menezes 2003). In Mexico school enrollment rates for indigenous people are 20 percent below the national average, even after decades of multilingual and multicultural public education programs. In Brazil and Ecuador completion rates are higher for white children than for black or indigenous children. In Guatemala and Peru language barriers delay primary school enrollment and are correlated to poor school achievement. Ethnic differences in school enrollment rates also exacerbate gender disparities. In Peru 65 percent of indigenous women and girls are illiterate; the comparable figure for the nonindigenous population is 26 percent (Menezes 2003).

Ethno-linguistic diversity creates serious challenges in Bangladesh, Ethiopia, and Pakistan. In Balochistan Province (Pakistan), four languages are spoken in addition to the national language (Urdu). Language barriers have had a significant impact on education access, especially for girls in rural areas, where local languages predominate. By the end of the 1980s, just 1–2 percent of women in Balochistan's rural areas were literate (Anzar 1999).

Educating children in conflict and postconflict countries

The imprecision of data for the world's forced migrants makes it impossible to accurately estimate the impact of conflict on education. UNESCO estimates that 50 million people are displaced throughout the world due to crisis, conflicts, and emergencies and that 70–80 percent of these people are women and children (UNESCO 2004c). The Women's Commission for Refugee Women and Children estimates that half of all forced migrants are children (Sommers 2002). Girls are at a particular disadvantage in conflict situations, because they are at risk of gender-based violence and are responsible for caring for siblings.

People affected by these emergency situations find it extremely difficult to provide their children with quality primary education. In Somalia, for example, only about one in five children of primary school age attends school. According to UNICEF (2004a), Somalia has just 1,192 functioning schools, most of which are in or around urban areas. Conflict has contributed to Somalia's very low enrollment, one of the lowest rates in the world.

Educating children with disabilities

About 40 million of the world's out-of-school children have some form of disability. Less than 5 percent of these children are estimated to complete primary school, and many never enroll or drop out very early. The education Goals clearly cannot be met without concerted and informed efforts to reach children with disabilities.

Many disabilities are not visible. They include speech and learning difficulties and physical, cognitive, sensory, and emotional disorders. Children also suffer from HIV/AIDS and other debilitating diseases.

Even children with mild or moderate disabilities are less likely to attend school, and if they do attend they are more likely to repeat grades and drop out. Left without an education, they are doubly disabled.

Table 4.2
Test results for
selected developing
countries

Source: Pritchett 2004.

Country and year	Age or grade	Description of test	Findings and study
Bangladesh 1998	11 and older	Basic learning skills in reading, writing, and written and oral mathematics. Professional panel specified minimal acceptable levels of performance for each area based on minimum skills considered necessary to function in the market place.	About two-thirds of rural test-takers who had completed primary school failed to achieve the minimum competency level in all four basic skill areas (Greaney and others 1998).
India 2000	Standards 3 and 4	Pretest and posttest administered for schools with and without remedial education assistance. Test included a math section and language section testing competencies prescribed by the Vadodara Municipal Corporation.	Only 5.4 percent of third-standard children in Vadodara and 14 percent in Mumbai demonstrated minimum competencies in math (Banerjee and others 2003).
Tanzania 1998–2000	Grade 7	Primary School Leaving Certificate testing skills in language, math, and general knowledge.	Only 21 percent of test-takers passed the language section, 19 percent passed the math section, and 22 percent passed the general knowledge section (National Exam Council of Tanzania).
Ghana 1994	Primary school	Raven's Progressive Matrices test, which measures abstract thinking ability, reading, and mathematics.	After six years of primary schooling, mean scores on the simple reading test were equivalent to random guessing (Glewwe and Jacoby 2000, cited in Lavy 1996).

Learning achievement needs to be measured

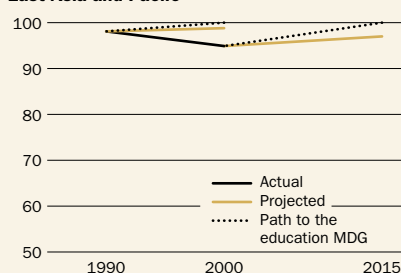
Measuring learning achievement is methodologically difficult and not systematically undertaken in the developing world. But it is an essential part of the puzzle if genuine education rather than just participation in schooling is to improve.

Analyses of internationally comparable assessments of learning achievement in math, reading, and science show that most developing countries rank far behind OECD countries. In fact, the best performing students in most developing countries perform at or below the level of the average student in OECD countries. This grossly overstates population-based achievement, of course, because in OECD countries education is universal, and in most developing countries a significant fraction of the school-age population is out of school and would not take the standardized test (Pritchett 2004).

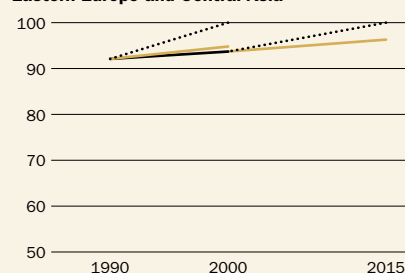
Figure 4.1
Primary net enrollment will need to increase dramatically in many regions if the Goal is to be met
Primary enrollment (%)

Source: Clemens 2004.

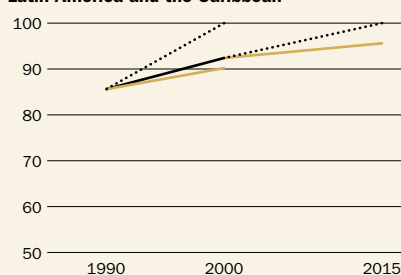
East Asia and Pacific



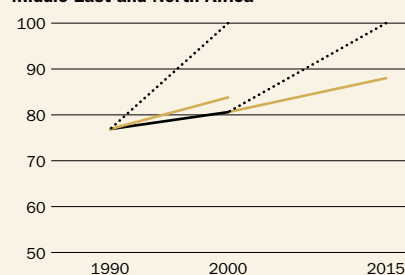
Eastern Europe and Central Asia



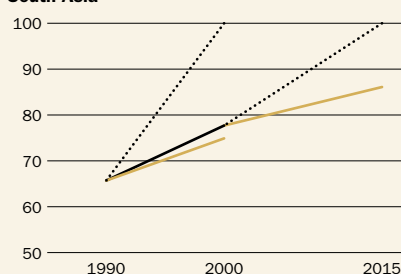
Latin America and the Caribbean



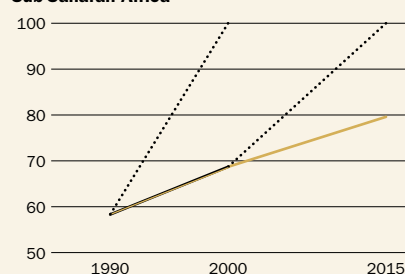
Middle East and North Africa



South Asia



Sub-Saharan Africa



The data on performance of students on national examinations is equally alarming. Performance on national examinations in South Asian and African countries shows major gaps in acquisition of knowledge and skills (table 4.2).

Conclusions and future prospects

Quickening the pace of progress toward universal primary education in the developing world will be a very tall order. An historical analysis of trends in enrollment from 1865 to the present shows both that there is a remarkably consistent pattern of transition from low to high enrollment (and from low to high gender parity) and that the transition in education coverage in many developing countries has been much faster than the historic transition exhibited by most developed nations (Clemens 2004).

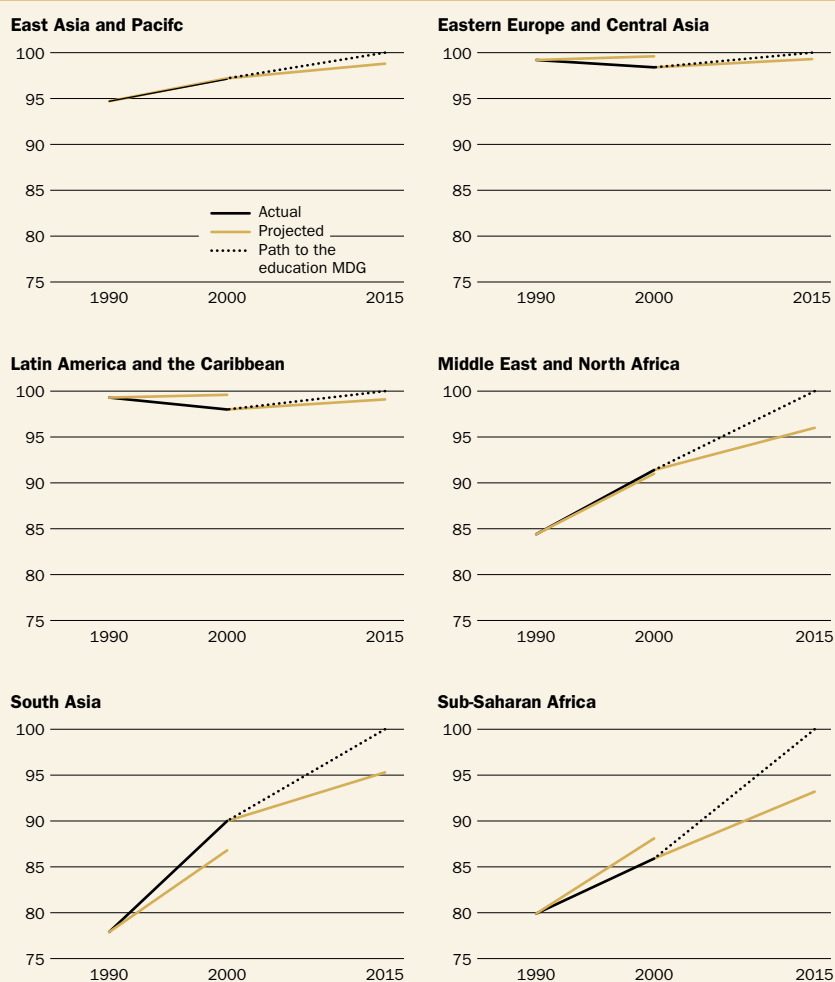
Unless current trends change significantly, however, the Millennium Development Goals (MDGs) of universal primary education and gender parity in

Figure 4.2

In most regions, more rapid change will be necessary to achieve gender equality in primary education by 2015

Net female gross primary enrollment as a share of male enrollment (%)

Source: Clemens 2004.



education will not be met in many countries in the developing world (figures 4.1 and 4.2). Latin America and the Caribbean and Europe and Central Asia will be extremely close to the goals if current trends continue. But Sub-Saharan Africa, South Asia, and the Middle East and North Africa will be at least 10 percentage points away from universal primary education.

Meeting the Goals will require addressing a variety of challenges:

- Primary enrollment and completion rates are lowest in Sub-Saharan Africa and South Asia—two regions that are also characterized by particularly low levels of girls' participation in school.
- In high-enrollment settings, including middle-income countries, drop-out rates among the poor are a serious problem.
- Girls make up a disproportionate share of out-of-school children. Children who are out of school tend to be poor, live in rural areas, belong to an ethnic minority, have a disability, or live in a region affected by or recovering from conflict.
- Being in school does not ensure that education is occurring. Major gaps in learning achievement are evident even where children are in school.

2

**Education systems in
developing countries: income,
institutions, and incentives**

Education systems in developing countries

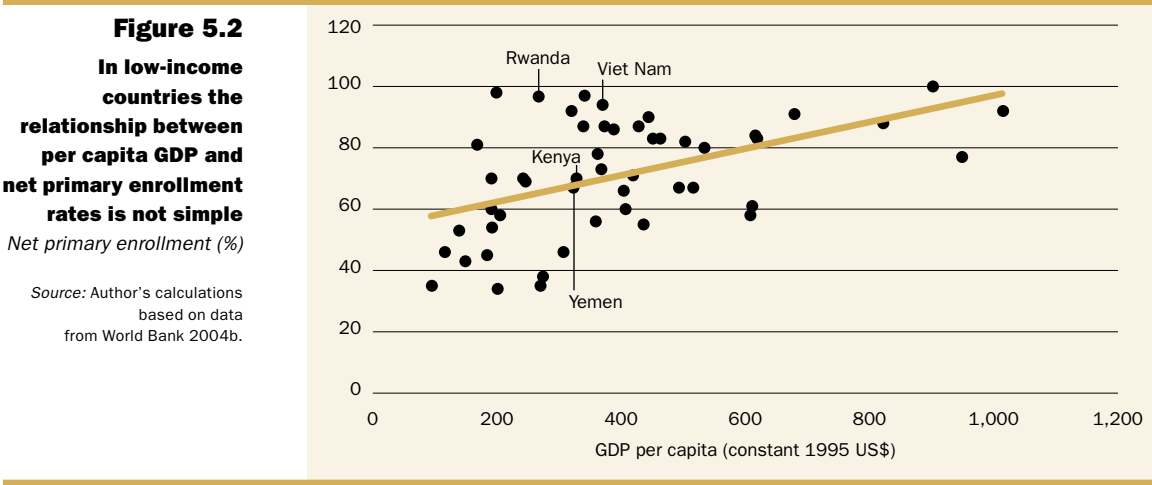
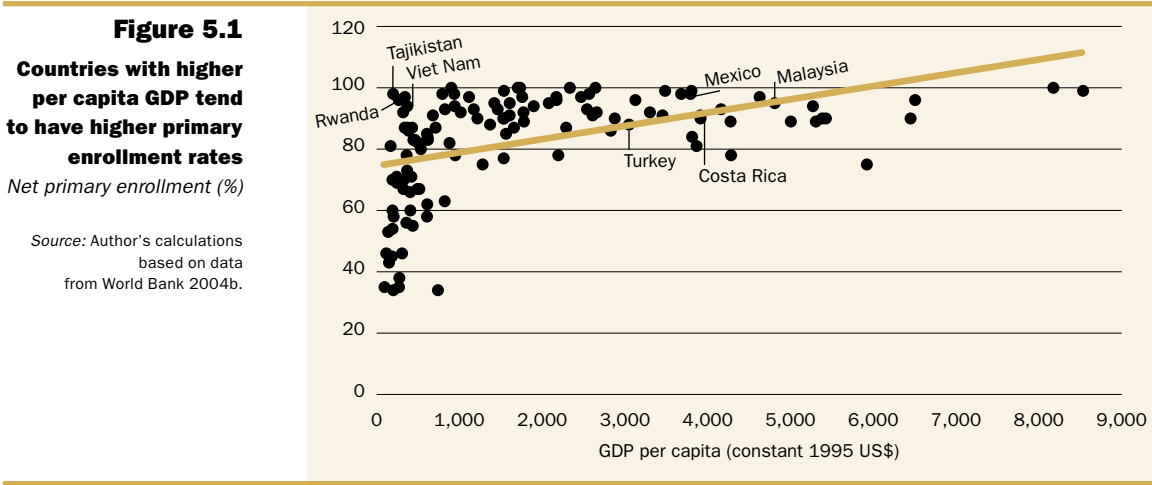
Statistics on enrollment, completion, and learning achievement capture part of the picture of where the world stands with respect to the education of its children.¹ Another part of the picture requires understanding how countries have managed, or not managed, their education systems and how the institutional arrangements and the incentives they create for parents, children, teachers, administrators, civil society, and politicians have mattered.

Many countries have made great strides in increasing educational opportunities, including opportunities for girls and boys from their poorest households. But in many parts of the developing world, schools and education systems are failing.

Per capita income and net primary school enrollment are correlated (figure 5.1).² Middle-income countries like Malaysia and Mexico have enrollment rates close to 100 percent, while enrollment rates in such low-income countries as Kenya and Yemen are less than 70 percent.

Income itself is neither necessary nor sufficient for countries to make progress, however. Rwanda and Viet Nam are very poor countries with high enrollment rates—higher even than in some much richer countries, including Costa Rica and Turkey. Enrollment rates vary enormously across low-income countries (figure 5.2). For countries with annual per capita GDP of \$200–\$400, enrollment ranges from less than 40 to close to 100 percent.

Many factors other than income also matter. The proportion of the population living in urban areas is important. So is a history of social mobilization (China, Cuba, and Sri Lanka all have high enrollment rates). The extent to which history and culture limit girls' attendance matters, too, as does the ability of a country's leaders to ensure that children learn.



High-performing educational systems can achieve results even with limited resources

Critical also is the level of performance of the education system. Many countries—including Chile, China Cuba, the Republic of Korea, Singapore, the Slovak Republic, Sri Lanka, Tunisia, and Uruguay—have built education systems in which primary completion is universal, and many have made progress in improving learning. Most of these countries are middle-income countries today, but many achieved universal primary completion when they were at the same stage of development as today’s poorer countries. And among the poorest countries today, an encouraging number have begun to register strong and sustained progress in primary completion. These include a large number of countries in Sub-Saharan Africa—Benin, Burkina Faso, Eritrea, Ethiopia, the Gambia, Guinea, Malawi, Mali, Mozambique, and Togo—all of which have increased the primary completion rate by more than 3.5 percent a year, well above the median 1.5 percent annual rate of improvement for low-income

**Examples of
successful
interventions
and evidence
from many
countries
provide a
menu of ideas
for education
leaders**

countries as a whole.³ In other regions Bhutan, Cambodia, the Lao People's Democratic Republic, Mongolia, Nepal and Nicaragua are also making strong progress. While all of these countries face major issues of education quality and efficiency—and none could yet be considered to have a high-performing education system—they are performing considerably better than their peers. These examples illustrate a central point: low-income countries can achieve universal primary completion, and it is possible to move more rapidly toward that goal.

In low-income countries that are making progress, some key principles appear to have guided education policymakers in defining strategies and choosing interventions. Examples of successful interventions (appendix 3) and evidence from many countries provide a menu of ideas for education leaders.

This chapter presents the principles and associated interventions that seem to have worked in successful education systems, recognizing that no one intervention makes sense in every setting. The next chapter builds on these examples to set out and describe two key strategies for all countries.

Principles and examples of associated interventions include the following:

- *Be pragmatic to reduce costs.* Countries that have jump-started progress toward raising primary completion rates have taken such pragmatic (though often politically difficult steps) as using contract teachers to make the costs of expanding coverage more fiscally sustainable (Ethiopia, Madhya Pradesh [India], West Africa); shifting to low-cost school construction methods (setting up open-air classrooms, as the Republic of Korea did in the 1950s; using local materials and community construction in other places); resisting pressures to reduce class size much below 40 until universal coverage is achieved; providing free primary education and recovering an increasing share of costs at other levels; and shortening the preservice teacher training cycle. All of these actions lower the unit costs of primary schooling and promote faster achievement of universal coverage. They give priority to finding cheaper but “good enough” models, achieving universal coverage at a modest standard and then gradually raising those standards over time.
- *Focus on teaching and learning.* Even systems with modest standards can keep the focus squarely on the teaching-learning process. Steps that can help do so include recruiting teachers based on content mastery; training teachers for student-centered or active learning instruction, rather than frontal instruction; measuring student learning outcomes (and giving teachers the same tests); designing good-quality curricula (in terms of both content and values), books, and materials and producing them in a cost-effective manner; using local language instruction for the first three to four years of schooling; implementing inexpensive but effective models of in-service teacher training (using master teachers, pedagogical advisers, and rural teacher self-help networks, for example; creating

**Few systems
in developing
countries
build in
accountability
at different
levels and
create
incentives for
performance**

performance incentives for teachers linked to school and student performance.

- *Make good use of the private sector.* Countries can capitalize on what private providers do best by allowing high-quality for-profit private firms to serve the “taste for quality” of the top 10 percent of the income distribution. They can contract with private providers (as programs have done in Bangladesh, Central America, and Colombia) and work with families and communities to relieve household constraints to schooling (by adapting the school calendar, for example).
- *Ensure that the benefits of expanding the education system are shared by the poor.* Countries can set clear rules for distributing resources across regions and schools.⁴ They can monitor outputs and outcomes across schools and regions to identify where performance needs strengthening; provide support, pressure, inspection, and skill-specific capacity building targeted to the lowest-performing regions and schools (as Cuba, Singapore, and Uruguay have done); target learning support within schools to students falling behind academically (through measures as simple as peer tutoring); develop condensed cycle accelerated programs to get drop-outs back in school and up to grade level; use targeted subsidies to enroll and keep vulnerable children in school; and set up cost-effective programs that support early child development (health, nutrition, and early stimulation of infants and young children).

Of course, no single intervention fixes an education system. Successful countries engage in a continuous process of identifying the binding constraint; generating new approaches (drawing on global evidence, but adapting it to their local constraints and needs), testing, monitoring, evaluating, and then focusing on the next issue.

Countries with low-performing systems need to address a variety of governance problems

In developing a strategy, it is critical to assess why education systems often fail to work. Lewis (2004) identifies many of these problems. According to her, in too many countries, systems are plagued by irregularities, poor management, and spending and investment that are unresponsive to local needs and preferences. Few systems in developing countries are structured in a way that builds in accountability at different levels and creates incentives for performance. This does not mean that all education systems are dysfunctional; indeed, under difficult circumstances, the progress of so many countries in the past several decades has been remarkable. It does mean that weaknesses in current systems are common and need to be addressed. The first step is to grasp the nature of so-called governance problems, which include poor management, local capture, teacher absenteeism, poor expenditure management and leakage, bribery, informal payments, corruption, and private tutoring.

**Public
education
systems
involve millions
of everyday
transactions
that are hard
to judge and
impossible
to monitor**

Poor management

Public education systems are among the most difficult of all systems to manage. They involve millions of everyday transactions—between students and teachers, parents and schools, school directors and communities, administrators and monitors at multiple levels—that are hard to judge and impossible to monitor. Exactly what is to be monitored is not straightforward. This combination of a higher number of transactions and low specificity (Fukuyama 2004; Pritchett and Woolcock 2002) makes management difficult.

A recent review of educational systems in Peru identified basic management failures by multiple players (Crouch 2004). The Ministry of Education has no idea how many teachers exist, despite the fact that it manages the payroll. The teachers union has no list of paying members. Both institutions suffer from clientelism (political patronage) in hiring.

Local capture

In Colombia public educational services at the department (equivalent to a state or province) level have completely captured the financing and management of education at the local level, blocking any parental or community participation. Teachers and headmasters are routinely hired based on party affiliation, regardless of their experience or training. The lack of accountability, the muting of parental voice, and the cynical exploitation of public monies for local political party imperatives have undermined education in Colombia. These factors help explain both citizen perceptions of a corrupt and unwieldy education sector and the poor performance of Colombian children on national exams (Duarte 1996). A five-state study found numerous cases of pure public negligence, including the closure of schools for months at a time for no reason, teachers' use of students as household help, and rampant corruption in the selection and appointment of teachers (PROBE 1999).

Teacher absenteeism

In a study of teacher absences in 9 countries and 19 Indian states, Peru had the lowest teacher absentee rate (11 percent) and Kenya and Uganda the highest (27–28 percent) (Alcazar and others 2004; Chaudhury and others 2004). A similar study of Indian public schools found that better educated teachers, teachers who lived farther away, and more senior teachers were more likely to be absent (Alcazar and others 2004). Surprise visits to schools in four Indian states found 33 percent of head teachers absent and only 25 percent of them actively teaching (PROBE 1999). Teachers remained on site an average of four hours, rather than the prescribed six, and for a variety of reasons they did not attend school at all for almost a third of the school year (PROBE 1999). Base-line surveys conducted by the District Primary Education Program in India found teacher absentee rates of 33 percent (Pandey 2000).

**Public
expenditure
tracking
systems
strengthen
accountability
at the central
government
and community
level**

In some parts of the world, particularly Sub-Saharan Africa, HIV/AIDS has significantly increased teacher absenteeism. The World Bank (2002a) report *Education and HIV/AIDS: A Window of Hope* reported that 30 percent of teachers in parts of Malawi and Uganda and 20 percent of teachers in Zambia are infected with HIV. In Kenya the number of teacher deaths rose from 450 in 1995 to 1,500 in 1999. Kenya can expect AIDS to claim the lives of almost 1.5 percent of the nation's teachers every year between 2002 and 2010.

Poor expenditure management and leakage

Analysis that tracked public expenditures from parliaments to individual schools in Africa revealed startlingly high leakage (Reinikka and Svensson 2001). On average only 13 percent of central government allocations for non-wage costs reached Ugandan schools between 1991 and 1995. To reduce leakages, the central government began announcing its monthly budget transfers in newspapers and on radio, and it required schools to post their receipt of funds. As a result of these and other measures, the flow of funds leapt to 90 percent in 1999, reflecting the importance of transparency and of community oversight of schools. Similar findings have emerged from surveys elsewhere, suggesting that public expenditure tracking systems, such as the ones applied in Uganda, strengthen accountability at the central government and community level. Similar results are reported for the Slovak Republic (Haulikova 2003).

Bribery

The *Voices of the Poor* study (World Bank 2000) provides qualitative results from around the world on the persistent and worldwide phenomenon of illegal fees to get children into school or to influence examination results (Narayan 2002).⁵

In national corruption reports, interviewees identified education as the most or among the most corrupt sectors in Azerbaijan, Colombia, Kazakhstan, the Kyrgyz Republic, Moldova, the Slovak Republic, and Tajikistan. The problem stems from unresponsiveness of public officials, including teachers; insistence on bribery to get anything done, including gaining access to school; and poor financial management.⁶

Bribery takes many forms. In Ghana 19 percent of households paid to get their child into primary school (World Bank and CDD 2000). In Pakistan 92 percent of households reported having to pay bribes, which averaged \$86 (Transparency International 2001, 2004). The nature of abuses associated with school acceptance, grades, and graduation at all levels of the school system has been documented in Belarus and the Slovak Republic (Transparency International 2001, 2004). Bribery in higher education has been documented in Uzbekistan (Jdanova 2000) and in Georgia (Mac-Williams 2002), where the amount charged for passing courses is publicly announced to students. Coris, a program of Transparency International, has

**Private informal
payments
finance
about half
of all public
education
costs in the CIS**

compiled reports from Belarus, Lithuania, Macedonia, Serbia and Montenegro, and the Slovak Republic on the extent and nature of bribes required to prepare for exams, pass them, enter university, and receive passing grades. In all of these countries, entrance, performance, and graduation entail payouts, especially in higher education.

These practices filter down into the earlier years as well, often in a less insidious form. In Cameroon teachers sold front-row seats to children, charged parents to correct their children's homework, and demanded private tutoring fees to ensure that students were promoted to the next grade (Bennet 2001). Because corruption is likely to be underinvestigated and largely undocumented, these findings represent a widespread pattern.

Informal payments

The desire of parents to ensure their children's school attendance and graduation can take other forms that border on corruption. The breakup of the Soviet Union and its highly centralized education system resulted in a breakdown in funding, oversight, and performance of schooling and a potentially lost legacy of education, due in large part to lack of involvement at the local level. But circumstances in the Commonwealth of Independent States (CIS) (the countries of the former Soviet Union) differ greatly from those in much of the rest of the world. Negative growth and uneven macroeconomic performance, uncertain priorities for education, and management inexperience also contributed. The challenge for the CIS is to retain achievement levels and revive disintegrating and increasingly underfunded education systems. Meeting this challenge will be difficult without consensus on priorities or approaches to education at the national or local levels.

Private informal payments finance about half of all public education costs in the CIS (Burnett and Cnობlock 2003). The frequency and extent of informal payments to teachers and schools, combined with in-kind contributions demanded of households, places undue burdens on families. In five of the poorest CIS countries, 1.6–5.2 percent of monthly household spending goes to education (table 5.1). Given the recent low birthrates in these countries, these figures are high, particularly given the level of poverty. Moreover, these average figures conceal the even greater share of income spent by the poor. In Armenia,

Table 5.1

**Household education
expenditures as a
share of monthly
spending in five CIS
countries**
Percent

Country	Year	Share of spending
Armenia	1998/99	5.2
Azerbaijan	2001	2.8
Georgia	2000	1.6
Kyrgyzstan	1998	4.1
Tajikistan	1999	2.4

Source: Burnett and Cnობlock 2003; World Bank 2003b.

That some poor countries have made progress suggests that it is possible to do so

for example, the average household allocated 5.2 percent of its monthly budget to education, but the lowest quintile spent 7.2 percent. In the Kyrgyz Republic the share of spending of the lowest quintile was four times the average. Both countries pledge free education for all.

Corrupt practices

The lack of appropriate legislation, oversight, and regulation has allowed a host of behaviors to surface. These problems include irregularities in hiring and firing teachers, questionable procurement, selling of grades and admission to all levels of education, and informal fees (Meier 2004). In Madhya Pradesh, India, teachers encourage students to copy from one another on national exams to ensure acceptable pass rates (PROBE 1999). Evidence is mounting that these problems are systemic. The challenges associated with a breakdown in observed processes for hiring and firing teachers in the Slovak Republic and the conflicts of interest that emerge for Belarus when teachers become purveyors of textbooks point to the extent of the breakdown in rules and regulations (Transparency International 2000). In Cameroon headmasters' posts were sold, the most prestigious ones by Ministry of Education officials (Bennett 2001).

Private tutoring

Private tutoring is common in East Asia and the CIS (Bray 1996, 2003; Burnett and Cnoblack 2003). Although decried by the education community, in and of itself such tutoring is not necessarily representative of corruption. It can reflect parental desire for additional or more intensive grounding in particular subjects or reflect the inadequate learning environment at school. Private tutoring becomes abusive when teachers fail to teach in the classroom, instead earning income from teaching their own students after hours; when teachers force parents to pay for tutoring if their children are to be promoted; or when teachers use other means of holding parents hostage until they pony up.

In many places, a high proportion of primary students receive private tutoring (45 percent in Hong Kong, China (SAR), 39 percent in Delhi, 69 percent in Kenya, and 73 percent in the Republic of Korea) (Bray 2003). Estimates for secondary school are even higher. Where the majority of children receive tutoring, it becomes difficult to keep up without such additional help.

Conclusion

That some poor countries have made such progress suggests that it is possible to do so. At the same time, problems in other countries illustrate the nature of the challenge, which goes well beyond gaps in enrollment, high drop-out rates, and low levels of learning achievement to the building of the institutions and the creation of incentives that underlie functional education systems.

Strategies for creating more and better educational opportunities

Countries that are unlikely to achieve the goal of universal primary education by 2015 face two challenges: they must simultaneously address shortfalls in access and in quality. They must significantly accelerate the enrollment of children and improve their ability to keep children in school, and they must achieve major improvements in learning outcomes and educational attainment at a level required to have an economic and social impact. Increasing access and improving quality are mutually reinforcing; if schools cannot offer a good-quality education, parents are far less likely to send their children to school.

Achieving more education and better education will require efforts in a number of domains within the education sector, as well as within the broader social and economic context. There are lessons to be learned both from countries that have succeeded—sometimes at levels far above what would have been predicted given their economic level—and from those whose progress has been slow.

Two major strategies can be used to address these challenges: getting out-of-school children into school and creating better institutions and more favorable incentives. The first strategy involves overcoming both demand- and supply-side constraints to enrollment and retention. The second requires successfully addressing serious and pervasive institutional shortcomings, many of which are linked to dysfunctional incentives for administrators and teachers. These strategies and interventions are intended as a menu from which country-level decisionmakers can craft approaches and solutions that are appropriate to local contexts.

Strategy 1: get out-of-school children into school

Higher levels of enrollment and longer retention in school can be stimulated in three ways: focusing on specific interventions to reach out-of-school chil-

Reaching out-of-school children will take special efforts, beyond what is typically thought of as scaling up

dren, increasing the educational opportunities (formal and nonformal) for girls and women, and increasing access to postprimary education. All of these approaches take into account the powerful demand-side influences that affect the propensity of parents to send their children to school.

Reaching out-of-school children will take special efforts, beyond what is typically thought of as scaling up. Expanding access to and completion of primary schooling implies reaching children from households at society's margins. Most of the roughly 104 million school-age children who are not attending school are poor and have parents who are uneducated and illiterate. In all countries poor children are less likely to start school, more likely to drop out, and more likely to engage in child labor or domestic chores that keep them from schooling. In most countries, girls are less likely to be in school than boys. Universalizing primary schooling cannot be achieved without addressing the specific reasons that poor children and girls do not attend school, repeat grades, and drop out.

Some interventions target getting poor children and girls into school and keeping them there by making schools affordable, reducing the direct costs for all children, and compensating for some of the added opportunity costs for girls. Other measures do so by increasing demand for schooling, through such measures as conditional cash transfers and school feeding and health programs.

No intervention is guaranteed to work, and the appropriateness and cost-effectiveness of each must be assessed given the particulars of the supply of and demand for education in a country, and the resource constraints it faces. Presented below are examples of the types of interventions that appear to work—and in some instances have been definitively shown to work—in improving education outcomes. It is important to note, however, that the evidence base is weak, particularly with respect to the type of rigorous evaluation findings that would be required to be able to make clear statements about what works and what does not work.

Eliminate school fees

Eliminating or reducing school fees has substantially increased enrollment, particularly for girls. When free schooling was introduced in Uganda in 1997, primary school enrollment nearly doubled, from 3.4 to 5.7 million children, rising to 6.5 million by 1999. Girls' enrollment increased from 63 percent to 83 percent, while enrollment among the poorest fifth of girls rose from 46 percent to 82 percent (World Bank 2002). In Tanzania the elimination of primary school fees in 2002 resulted in additional enrollment of 1.5 million students (Coalition for Health and Education Rights 2002). A scholarship for girls in Tanzania significantly increased their enrollment in secondary school (the program was subsequently extended to boys as well). In Bangladesh a stipend for

**Eliminating
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particularly
for girls**

girls in secondary school substantially increased their enrollment, particularly in rural areas (World Bank 2001).

The increased enrollments that result from eliminating fees represent an important achievement. For girls especially, just the opportunity to leave home daily and participate in a larger social setting may matter. Indeed, that opportunity may help explain why women with five or six years of schooling, who may barely have retained literacy as adults, have fewer and healthier children and are more likely to ensure that their own children attend school (IDB 1999).

It is also true, however, that a surge in enrollment can significantly strain educational systems. In Malawi the elimination of school fees in 1994 led to a 55 percent increase in enrollment. The addition of 1.2 million students overwhelmed the capacity of Malawi's schools (Rugh 2000) and was followed several years later by drop-out rates that brought primary completion rates virtually back to where they had been. In the immediate aftermath of fee elimination, the sudden lack of resources at the school level and surging enrollments are bound to overwhelm the education system, unless there is adequate planning and new resources reach the schools. A second generation of education reforms in Malawi, Tanzania, and Uganda, which focused on quality improvements and replacement financing, has had far more success in sustaining enrollment and increasing completion rates.

Of course, reducing or eliminating tuition has little impact if school districts are permitted to levy additional fees, such as building funds and student activity fees. Kenya first tried eliminating tuition in 1974, but these other fees quadrupled the cost of schooling to parents in some districts, resulting in a substantial increase in the drop-out rate, particularly in poorer districts (Herz and others 1995). Experience shows that eliminating fees will not help poor families unless more equitable and efficient sources of financing are provided, either by transferring district, provincial, or central government funds to the local level or by providing funding from locally raised revenues, something that occurs only rarely.

Provide conditional transfers

Programs for conditional cash transfers for education provide resources directly to targeted beneficiaries only when they keep their children in school. Such programs serve as social safety nets, raising the immediate incomes of impoverished families while also increasing the human capital of the poor by educating their children. Conditional transfer programs are well established in Mexico (Progresá), Brazil (Bolsa Escola), and Bangladesh (Food for Education). Such programs also exist or are being planned in Argentina, Chile, Colombia, Ecuador, Honduras, Jamaica, Nicaragua, and Turkey (Morley and Coady 2003). In addition, the World Food Programme assisted 27 countries with "take-home rations" programs in 2002.¹

**School feeding
programs
disproportion-
ately benefit
poor children**

In Mexico, Progresa (the expanded form of which is now known as Oportunidades) provides cash transfers to poor households in the most marginal rural areas. The transfers are provided as long as children attend school regularly. The program has increased enrollment rates at the primary and especially the secondary levels, for boys and especially girls. The greatest impact was during the important sensitive transition year to secondary school, during which girls' enrollment rose 20 percent and boys' enrollment rose 10 percent. The program is expected to increase educational attainment for the poor by 0.66 years of additional schooling by grade 9 (T.P. Schultz 2000).

In Bangladesh the Food for Education program provides a monthly in-kind food transfer (primarily wheat) to poor households as long as their primary school-age children attend school. Enrollment at participating schools increased 35 percent (44 percent for girls and 28 percent for boys). For the country as a whole, school enrollment had risen just 2.5 percent over two years. Attendance was higher and drop-out rates lower in Food for Education schools (Morley and Coady 2003).

Nicaragua's conditional cash transfer program for poor households with children in primary school has also produced results. Enrollment increased 22 percent, with the poorest households benefiting most. Grade progression also improved, particularly among the poorest students (Morley and Coady 2003).

Offer school feeding programs

School feeding programs disproportionately benefit poor children by creating incentives to enroll in and attend school and by improving health, attentiveness, and capacity to learn. Offering meals at school is an effective way to encourage children who are poor and chronically hungry to attend classes. In Bangladesh school-based food distribution increased enrollment 20 percent at a time when enrollment at nonparticipating schools fell 2 percent (Ahmed and Billah 1994). In Jamaica, Tamil Nadu (India), and other places where school feeding programs have been evaluated, attendance and retention generally rose (Simeon and Grantham-McGregor 1989; Babu and Hallam 1989). In Kenya a randomized control study demonstrated that children's school participation was 30 percent higher among students attending schools with feeding programs (Vermeersch 2002).

World Food Programme case studies in Cameroon, Morocco, Niger, and Pakistan have documented strong improvements in enrollment and attendance when families receive food incentives in return for good school attendance (World Food Programme 2001). In Pakistan enrollment of girls increased 247 percent in the North West Frontier Province and 197 percent in Balochistan Province between 1994 and 1998. Student attendance and dropout rates were also positively affected. Each month a five-liter tin of vegetable oil was distributed to the family of each female student who attended school for at least

School health programs, such as deworming and iron supplementation, also increase school attendance and raise scores on tests of cognition or school achievement

20 days (World Food Programme and UNESCO 1999). In Morocco girls in targeted rural communities who attended school regularly were given 100 kilograms of wheat and 10 liters of vegetable oil per year for good attendance. Within the first two years of the program, the number of girls in the first grade doubled, and in one province covered by the project girls made up 43 percent of total primary enrollment in 1999, up from 10 percent in the early 1990s (World Food Programme and UNESCO 1999).

Hunger and chronic malnutrition reduce learning achievement of children already in school. In poor households the problem begins early, with malnutrition and poor health of mothers. Poorly nourished women give birth to children of low birth weight. In the absence of special interventions, these children often lack the micronutrients and energy required for normal development, critical to their learning once in school.

The Food and Agricultural Organization estimates that 300 million children, most of them in developing countries, are chronically hungry (World Food Programme 2003a). Without breakfasts, students are more easily distracted in the classroom and have problems staying alert and concentrating on lessons. Studies in many countries suggest that hunger affects cognitive functions and may therefore impair a child's ability to benefit from schooling. A program that provided breakfasts to primary school children in Jamaica significantly increased arithmetic scores (Simeon and Grantham-McGregor 1989). School feeding programs that address specific micronutrient deficiencies have also been shown to improve school performance. Iron supplementation raised test scores of preschool children in India (Seshadri and Gopaldas 1989). In Kenya students participating in a feeding program had higher test scores, but only in schools where teachers were relatively well trained before the program started (Vermeersch and Kremer 2004).

This evidence led the International Food Policy Research Institute to conclude that "hunger is a barrier to learning. . . . A hungry child cannot concentrate. A hungry child cannot perform. Hungry children are unlikely to stay in school. School-based feeding programs have proven effective in encouraging enrollment, increasing attention spans, and improving attendance at school" (IFPRI 2001, p. 3).

Offer school health programs

School health programs, such as deworming and iron supplementation, also increase school attendance and raise scores on tests of cognition or school achievement. The World Health Organization (WHO) has identified worm infections as the greatest cause of disease among 5- to 14-year-old children. School health programs have provided deworming medicine, with great success. In Kenya school-based mass treatment of children for hookworm reduced student absenteeism by one-quarter (Miguel and Kremer 2003). In India a program to provide iron supplementation and deworming medicine to pre-

Increasing girls' educational attainment is essential to fulfilling education's potential

school students decreased absenteeism 7 percent among 4- to 6-year-old children (Bobonis, Miguel, and Sharma 2002). A study in Indonesia investigating the association between helminth infection and cognitive and motor function in school-age children found that children infected with hookworm scored significantly lower on tests of cognitive function than did uninfected children (World Bank and the Partnership for Child Development 2004). Deworming treatments are safe, inexpensive (the average cost is \$.30 per child per year), and so easy to administer that teachers and even semiliterate community workers can be trained to successfully manage school- and community-based deworming campaigns (Awasthi, Bundy, and Savioli 2003).

Recent evidence demonstrates the benefits of deworming treatments in addressing other critical health problems as well. Deworming appears to improve the effectiveness of malaria control measures (Molyneux and Nantulya 2004). People free of soil-transmitted intestinal parasites have “the same degree of protection against malaria as that provided by sickle-cell trait carriage, the most potent factor of resistance to malaria identified to date” (Spiegel and others 2003, p. 199). Worm infections make their hosts more susceptible to HIV infection and enable the virus to replicate more rapidly; chronic worm infections may also account for the higher prevalence of tuberculosis in low-income countries (Stephenson 2001; Borkow and Bentwich 2000).

Providing water and sanitation facilities at school is critical, especially for girls. According to the Ugandan Health Minister, Dr. Crispus Kiyonga, “Lack of latrines, especially separate latrines for girls, was identified as the worst school experience for girls.... Privacy issues relating to sanitation are a major factor forcing girls out of school” (World Bank 2004). A Department of Public Health Engineering–UNICEF study conducted in Bangladesh in 1994–98 showed that provision of water and sanitation facilities in schools increased girls' attendance 15 percent (World Bank 2004).

Recognizing the need to improve approaches and strategies to health and nutrition in schools, UNESCO, UNICEF, the WHO, and the World Bank launched an interagency initiative in April 2000. In 2001 the World Food Programme joined the initiative, called FRESH (Focusing Resources on Effective School Health and Nutrition) (UNICEF 2001). Collaborators identified a core set of best practices from health programs that promote learning through improved health and nutrition. They also identified interventions that would be feasible in resource-poor schools and in hard-to-reach and urban areas. Policymakers can consult this framework to develop their own strategy.

Create programs for girls

Increasing girls' educational attainment is essential to fulfilling education's potential for positive social transformation. Education is the key intervention for increasing inclusion of women in decisionmaking in public life, as well as empowering them within the home and the workplace. Given the barriers to

**Schools need
to be safe
places for girls**

girls' education, specific interventions are needed to make schools more accessible and secure for them.

Providing female teachers for girls may address some security concerns, as well as provide positive role models. International cross-sectional data suggest some positive correlation between gender parity in enrollment and the proportion of female teachers (Herz and others 1995). Qualified female teachers, however, are in short supply.

Schools need to be safe places for girls. Girls need to be protected against harassment from male peers and predation by male teachers (Lloyd and Mensch 1999). The problem is a serious one: in Cameroon 27 percent of girls surveyed reported having had sex with teachers (UNICEF 2002a). Changing this pattern of behavior involves significant cultural changes.

Decreasing the distance to school raises girls' enrollment and attendance by assuaging their concerns about safety and reputation. Research in such diverse places as Ghana, India, Malaysia, Peru, and the Philippines indicates that distance matters for all children, especially for girls (Sipahimanlani 1999; Lavy 1996; Gertler and Glewwe 1992; King and Lillard 1987). Providing schools in local communities substantially increased enrollments in Egypt, Indonesia, and several African countries. The impact is particularly pronounced for girls. In Egypt, for example, following a campaign to construct rural primary schools, girls' enrollment grew by 23 percent, while enrollment of boys rose 18 percent (Dufflo 2001; Rugh 2000; Filmer 1999).

Girls and their families may find little reason to attend school if they are taught that girls are of less value than boys or if they are tracked into fields of study or low-paid occupations considered traditional for women. Analyses of textbooks in Africa, Asia, and the Middle East consistently find stereotyped material, with women portrayed as subordinate and passive while men are shown as displaying intelligence, leadership, and dominance (Lloyd and Mensch 1999; Herz and Sperling 2003). Many developing countries also practice gender streaming in secondary school, directing girls away from math and science (Herz and others 1995). Teaching practices—such as giving boys more opportunities than girls to ask and answer questions, use learning material, and lead groups—may further discourage girls (UNICEF 2002). Several countries in Africa and Asia are beginning to use gender sensitivity training for teachers and administrators to encourage girls' participation (UNICEF 2001).

The opportunity costs for girls' education that arise from their heavy burden of household chores can be addressed in a variety of ways. Some measures reduce the need for girls' work by establishing day care centers and pre-schools for younger siblings or students' children or improving the supply of accessible water and fuel. Others—such as flexible school schedules—enable girls to pursue an education while assuming household responsibilities. Take-home food rations for the families of girls in school can offset the loss to the household of the girls' labor. Flexible schedules, double sessions, and evening

**It is essential
that education
programs start
during and
immediately
after conflict**

school hours have been introduced in Bangladesh, China, India, Morocco, and Pakistan (Herz and others 1995).

No programs appear to be in place that encourage boys take on a larger share of the domestic load, although preliminary evidence suggest that at least in some situations, declines in boys' school attendance may be associated with significant increases in girls' attendance (World Food Programme 2003). If such an association does exist, it is likely to be because boys must perform some or all of the household labor previously performed by girls. In Latin America the fact that girls' enrollment often exceeds boys' enrollment may reflect the higher opportunity cost of boys' time (working in the fields or in the streets). This illustrates the need to shape specific interventions based on local conditions.

Educate children in conflict and postconflict societies

Lack of access to education is often severe among children in regions experiencing or recovering from armed conflict. A review of the limited evidence suggests that provision of education during and after conflicts is possible, despite the hardship imposed on children, teachers, and program administrators. It is essential that education programs start during and immediately after conflict; countries cannot wait until "security" is established without losing a generation of children. Education must be seen as a core part of national healing and reconstruction.

To respond to the needs of these conflict and postconflict countries, the Inter-Agency Network for Education in Emergencies (INEE) created the collaborative Initiative on Education in Situations of Emergency and Crisis. INEE creates forums for communities, practitioners, researchers, and experts to share resources and information, identify problems and issues that affect education programs, and share best practices (UNESCO 2004c). It encourages all donors to put more resources into education for emergency programming and to ensure an early reconstruction response following conflicts.

UN agencies, especially the United Nations High Commissioner for Refugees (UNHCR), UNICEF, and the World Food Programme, have worked together and with nongovernmental organizations (NGOs) to support education in emergencies and refugee situations. UNICEF and the World Food Programme have cooperated to implement large-scale Back-to-Peace, Back-to-School campaigns in a variety of postconflict situations, including Afghanistan, Angola, Liberia, and Sierra Leone (World Food Programme 2004).

Educate children with disabilities

Of the 40 million children in the world with disabilities, it is estimated that more than 90 percent do not attend school (UNESCO 2004a). Both developing countries and donors need to target this group if efforts to increase enrollment are to reach many children with disabilities. Country plans should

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to the next**

include teacher training, school construction, outreach, retention efforts, and performance assessments. Early child development programs are important, as screening can identify disabilities early enough to make timely, effective interventions. Without better data and research on children with disabilities and their experiences in the education system, such targeting will not be possible.

In many cases a small investment can have a dramatic impact on a child's ability to learn and stay in school. In Brazil, for example, more than one-third of the 14 percent of children with disabilities have visual problems that are correctable by glasses (World Bank n.d.) As new schools are built to respond to increased demand for education, they can be made accessible to children with physical disabilities for less than 1 percent extra in construction costs (U.S. Architecture and Transportation Barriers Compliance Board 2004).

Developing countries are slowly beginning to address the education needs of children with disabilities. An effort launched in Panama in 1995, as part of a broader education reform, created a national directorate for special education to help students with disabilities enter the public school system. Implementation of this reform initially was slow, but the recently elected government has made a new commitment to educating children with disabilities. Beginning in 2005 the government will launch a three-year inclusive education plan to end segregated classes for children with disabilities and enroll them in regular classes. The government will also train teachers to address the needs of these students in integrated classes.

Break the cycle of poverty and illiteracy by educating mothers

Educating girls and mothers leads to sustained increases in education attainment from one generation to the next. It can change a society in which not sending one's children to school is socially acceptable into one in which the expectation is that every child completes school. A wealth of cross-country and individual country studies from Africa, Asia, and Latin America over the past 25 years reveals that mothers' education is a strong and consistent determinant of their children's school enrollment and attainment.

Multiple studies find that a mother's level of education has a strong positive effect on their daughters' enrollment. The effect on daughters' enrollment is stronger than the effect on sons' enrollment, and it is significantly greater than the effect of fathers' education on daughters. Studies from Egypt, Ghana, India, Kenya, Malaysia, Mexico, and Peru all find that mothers with a basic education are substantially more likely to educate their children, especially their daughters, even controlling for other influences (Lavy 1996; Ridker 1997; King and Bellew 1991; Lillard and Willis 1994; Alderman and King 1998; Kambhupati and Pal 2001; Parker and Pederzini 2000; Bhalla, Saigal, and Basu 2003).

Moreover, the more educated a mother is, the better. A study by the Inter-American Development Bank found that in Latin America 15-year-olds whose

Education is related to an adult's long-term earning capacity and to women's bargaining position for resources within the family

mothers have some secondary schooling remained in school two to three years longer than the children of mothers with less than four years of education (IDB 1998).

A study of 57 internationally comparable household datasets from 41 countries found that the education of adults in the household has a significant impact on the enrollment of children in all of the countries studied (Filmer 1999). The effect of mother's education is larger than that of fathers in some but not all countries. In countries in which the marginal effect of maternal education is significant, it increased the likelihood of enrollment by less than 1 percentage point to 6 percentage points. The study supports the view that women's education often has a stronger impact than men's education in breaking the cycle of low educational outcomes.

How does maternal education affect children's enrollment? Several mechanisms have been suggested. First, education is related to an adult's long-term earning capacity and to women's bargaining position for resources within the family. Educated mothers may have the resources they need to send their children to school. Second, more educated mothers may provide a more cognitively stimulating experience for their children. They may play a more effective pedagogical role, encouraging, monitoring, or helping their children do their homework or prepare for examinations. Third, educated mothers serve as role models for their children. If children, particularly girls, know that their mothers attended and valued schooling, they may aim to follow their example.

Several studies have sought to isolate these different causal mechanisms. Research in Latin America suggests that the pedagogical model does not apply there. "Were this a pedagogical story," concludes the Inter-American Development Bank (1999, p. 74), "mothers who do not participate in the labor market would be expected to have more time to improve their children's schooling. However, children of working mothers actually attain higher educational levels than those of mothers who do not work." After controlling for a variety of factors, the study finds that a mother's participation in the labor force increases a child's likelihood of being enrolled in school. In 13 of the 15 Latin American countries for which data were available, this positive effect of a mother's participation in the labor market on a child's educational enrollment is positive and statistically significant. On average if a mother participates in the labor market, her child will remain in school two or three more years.

Is there still a positive and significant impact on children's education where educated women do not participate in the labor market? Behrman and others (1999) examined the relationship between maternal education and children's schooling in a region of India with very low participation of women in the formal labor market. Their findings underscore the potential pedagogical effect of maternal education. Despite the absence of market returns to female schooling, their study reveals a rapid increase in demand for schooled wives in areas of high agricultural growth. They interpret this as derived demand for

Increased investment in female schooling has social payoffs, even where there are not substantial labor market opportunities

female schooling as an input in the production of child schooling. Returns to women's schooling are found in the household sector, where schooling increases "the efficiency of maternal time in the production of child human capital" (p. 36). Children of literate women study two hours more a day than children of illiterate women. Increased investment in female schooling thus has social payoffs, even where there are not substantial labor market opportunities for the women themselves. The authors of the study conclude that increasing labor market opportunities for women is not necessary to justify increased investments in female schooling, which have payoffs even in settings with increased demand only in male-dominated occupations. The conclusion from these studies is obvious: improving educational opportunities for girls is essential to improving the next generation's educational outcomes.

Whether providing educational opportunities to uneducated or illiterate mothers of young children today can break the cycle and facilitate better education outcomes in the current generation remains unclear. But some evidence suggests that it can.

In one study of the survival of children of women who acquired literacy exclusively through the adult education campaign that took place in Nicaragua in the 1980s, researchers demonstrated a strong association between maternal literacy and child health. Socioeconomic status did not account for the survival and nutritional advantages of children born to educated mothers.²

A longitudinal study in Nepal concluded that women's literacy programs had a positive impact and contributed to women's empowerment or advancement or their social and economic development. Women who participated in the program were poorer than women who did not, more likely to send their children to school, more knowledgeable about family and reproductive health issues and several health and related political issues, and more likely to participate in income-generating, community, and political activities (Burchfield 1997).³

A longitudinal study with a similar focus carried out in Bolivia found that NGO-sponsored literacy programs had a significant positive impact on women's social and economic development (Burchfield and others 2002). Controlling for education level, marital status, locality, home material possessions, and season, the study found that program participants experienced greater gains in reading skills and were better able to help their children with homework than were nonparticipants. Few mothers were reading to their young children, however, and the program had little impact on women's involvement in their children's school. Whether or not women were participating in these programs, when faced with difficult economic times, their daughters were at greater risk of dropping out of school than their sons.

In light of these results, support to women's literacy programs should be considered an important complement to interventions to increase access and retention at the primary school level. Adult literacy programs may be particu-

larly useful in settings in which there are pockets of undereducated women, such as ethnic minorities or members of indigenous communities.

Expand postprimary education

The Goals have focused much of the world's attention on the completion of a five- or six-year cycle of primary education.⁴ The commitments at Dakar referred to basic education of eight or nine years of schooling. Different countries define "primary," "basic," and "secondary" in terms of different numbers of years. However defined, the task force believes that a focus on completion of just five or six grades is too narrow, for several reasons.

First, the hoped-for economic and social benefits of education may be unattainable with only five or six years of schooling (see appendix 6.) One of these benefits is reduction in the incidence of HIV/AIDS (box 6.1). Between 1990 and 2000 the likelihood of a young person who attended secondary school contracting HIV/AIDS declined by 12 percentage points; the figure for students who had not completed primary school was just 6 percentage points (De Walque 2004). By 2000 young rural Ugandans who were in secondary school had a prevalence rate of just 3.2 percent—one-third the rate of those with no education and half the rate of those with some primary education (De Walque 2004). Evidence shows that girls who have attended secondary school are more likely to assert their rights to protection in a sexual relation-

Box 6.1 **Educating children** **can help slow** **the spread of** **HIV/AIDS**

Universal primary education could save at least 7 million young people worldwide from contracting HIV over a decade (700,000 cases a year), according to a recent report from the Global Campaign for Education (2004). About 36 percent of young adults in low-income countries never completed primary school, but they account for an estimated 55 percent of new HIV cases among young people.

Education can serve as a "social vaccine" against HIV, especially for school-age children and young adults. A review of 11 studies of school-based HIV prevention programs for youth in Sub-Saharan Africa found that it is easier to establish low-risk behaviors and build knowledge around prevention among younger students who are not yet sexually active (Gallant and Maticka-Tyndale 2003). Reaching children when they are young is thus very important.

Given that the HIV infection rate in many developing countries is growing fastest among teenage girls, educating girls may be critical to breaking the pattern. Girls who attend school are far more likely to understand the risks involved in risky behavior, to reject the myths associated with sex, and (in the case of good school programs) know how to use effective refusal tactics in difficult sexual situations (Herz and Sperling 2004).

Schools provide a ready-made infrastructure for reaching the world's children with education to change behavior before they become infected. Unfortunately, HIV/AIDS is also undermining education systems and pulling children, especially girls, out of school. In Zimbabwe, for example, a study of five provinces found that more than three-fourths of the children pulled out of school to care for relatives with AIDS are young girls (UNESCO 2002). In these circumstances, it is critical to simultaneously attack HIV/AIDS and work to preserve and improve the school system, incorporating education on HIV/AIDS as a critical part of teaching.

**Parents see
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in itself**

ship, reducing their vulnerability to HIV infection (Herz and Sperling 2003). A 32-country study found that women with postprimary education are five times more likely than illiterate women to know the facts about HIV/AIDS (Vandemoortle and Delamonica 2000). Illiterate women are three times more likely to think that a healthy-looking person cannot be HIV-positive and four times more likely to believe that there is no way to avoid AIDS (Vandemoortle and Delamonica 2000). In Zimbabwe only 1.3 percent of girls ages 15–18 who were still enrolled in school were HIV-positive. Girls of a similar age who had dropped out of school were more than six times as likely to be HIV-positive (Gregson and Chandiwana 2001).

Second, the demand for primary education may be determined in part by the availability of secondary education slots, because parents may understand that the economic benefits of primary schooling alone are not great enough to offset the opportunity cost. Particularly where the quality of primary schools is low, parents see primary school as a necessary step their children need to take before continuing their education, not an end in itself. Of course, success in moving close to universal primary school enrollment generates new challenges. As more children complete primary school, the private benefits, in higher wages, will decline (the social benefits remain large, which justifies making primary school access universal). Private rates of return to primary education—perceived and real—cease to be seen as much of a reason for sending one's children to primary school unless access to postprimary education increases.

Third, expanding the existing education systems in many developing countries and scaling up other public sector functions (particularly health services, water management, and general public administration) requires a larger cadre of educated and trained workers.

In most developing countries, secondary and other forms of postprimary schooling are heavily slanted toward better-off segments in society—and, in most countries, toward boys. Countries must begin to identify and implement strategies such as need-based scholarships to reverse the tendencies toward inequitable access.

Spending on postprimary education should be additional to spending needed to provide universal access to good-quality primary education. The greater demand that postprimary opportunities can generate for primary school is unlikely to create the kinds of efficiencies that will reduce the cost of providing primary education. Donors will thus need to provide additional financing for postprimary schooling.

Implications for strategy 1

These findings suggest several actions that can be taken by country-level decisionmakers seeking to increase the number of school-age children in school:

- Depending on local conditions, introduce, test, and scale up specific strategies to attract out-of-school children to school.

**Several actions
can be taken by
country-level
decisionmakers
seeking to
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number of
school-age
children in
school**

- Support adult literacy programs designed for mothers of young children, evaluate the programs to determine whether they are working, and use that information in future decisionmaking.
- Balance investments in primary education with selective support to postprimary education, paying particular attention to educational opportunities for girls and young women. Include planning for expanding postprimary education with planning for achievement of universal primary education.

Strategy 2: create better institutions, increase transparency, and provide better incentives

Sustained improvements in education are impossible to achieve without improving both parental involvement in decisions affecting their children's education and the way key institutions in the sector function. These institutions include the schools and local and national authorities that have influence over funding and school management. Many of the countries that are performing poorly suffer from institutional weaknesses, including low management capacity, nontransparent resource allocation and accounting practices, and substandard human resources policies and practices. Incentive structures fail to reward good performance over bad create and reinforce the most deleterious characteristics of weak institutions.

Parents who are both well informed about policies and resource allocations in the education sector and involved in decisions about their children's schooling exert considerable influence and contribute solutions. Involved communities are able to articulate local school needs, hold officials accountable, and mobilize local resources to fill gaps when the government response is inadequate.

While recognizing that context-specific solutions will be required, the task force identifies five specific ways that education institutions can be improved: strengthening the national commitment, improving accountability through local control, improving the quality and availability of the information base, investing in serious evaluation to learn what affects learning outcomes, and strengthening the role of civil society organizations.

Strengthen the national commitment

Successful education requires a strong national commitment, expressed in the legal and institutional framework as well as in budgetary outlays to the sector. A commitment to compulsory primary education signals that the nation's leaders place high priority on education as a central pillar of development and supports healthy debate about what constitutes education and how it can be funded. Having a strong national framework for primary or basic education is a necessary, although not sufficient, condition for the full set of institutional changes required to accelerate progress.

**One part of
the solution to
institutional
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community
involvement
in education**

Improve accountability through local control

One part of the solution to institutional problems is parental and community involvement in education, which anchors education in the social fabric of the community, fosters demand, and ensures that schooling provides social benefits and economic returns that reflect local priorities and values.⁵ Whether parents and communities provide financial support, administrative support, or simply play an oversight role, local engagement, commitment, and support remain vital to ensuring that schooling is a priority for the community. Because the direct and opportunity costs of schooling and the real or perceived lack of economic returns dampen demand for education, such support cannot be taken for granted.

Experiments that have devolved authority and fiduciary responsibilities to parents and communities have produced encouraging results. Evidence suggests that greater parental and community control leads to higher teacher attendance. Evaluations in Argentina, Brazil, Chile, El Salvador, Honduras, Mexico, Nicaragua, Nigeria, Peru, and a number of Indian states link reduced absenteeism to involvement by parents, the community, or the school leader (Chaudhury and others 2004; Vegas 2002; Gaynor 1998; Gershberg and Winkler 2003; Pandey 2000; PROBE 1999; Alcazar and others 2004).

Oversight and authority by parent-teacher associations or parent councils were found to raise student test scores in Argentina, Brazil, Honduras, India, Indonesia, and Nicaragua (Eskeland and Filmer 2004; Paes de Barros, Mendonca, and Soares 1998; King and Ozler 2001; Di Gropello and Marshall, 2004; PROBE 1999; Pandey 2000; Alatas and Filmer 2004) and to reduce drop-out and repetition rates in some of these countries. A cross-country regression of 10 Latin American countries found that parental participation has the strongest impact on student achievement and that autonomy without parental involvement is only marginally important (Gunnarsson and others 2004).

Probably the most celebrated case of successful parental control is that of the Community-Managed Schools Programme (EDUCO) in El Salvador, where parents select, hire, supervise, and dismiss teachers—all responsibilities traditionally controlled by the central government. The program links teacher salaries to performance and leaves budget management in the hands of parent committees. Although program households are poorer, parents have less education, and access to services is below the average for El Salvador, EDUCO led to greater parental participation in school affairs, lower teacher absenteeism, more textbooks, and lower teacher-to-pupil ratios. Government transfers were more reliable in the EDUCO schools, and EDUCO students tested almost as well as students in other schools, a remarkable result given that these students came from the poorest communities (Jimenez and Sawada 1998; Sawada 1999; Ragatz and Sawada 2004).

In what may be the most extensive reform in Latin America, Nicaragua delegated management and budget to autonomous local school councils, who

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hire and fire school staff, set salaries, and establish and handle school fees. The intent of the reform was to devolve control to communities and to generate local fee revenue to finance bonuses for well-performing teachers. This feature of the program led to support from teachers, whose union opposed the reform. Broad parental participation raised additional revenue for schools from school fees and ensured community control of the schools.

The arrangement proved popular with communities. Between the inception of the reform (in 1993 for secondary schools and 1995 for primary schools) and 2000, more than half of all primary schools and 80 percent of secondary schools became autonomous, all at the initiative of communities. Teachers expressed mixed views on the new structure, but they have also paid more attention to student performance and become more responsive to school councils (Fuller and Rivarola 1998; King and Ozler 2000; Gershberg 2004).

In Honduras the Community-Managed Education Program (PROHECO) shifted school management, and teacher hiring, salaries, and oversight to school directors, teachers, and communities. The degree to which responsibility is exercised by the three players varies across communities. Relative to traditional schools, PROHECO schools report longer teaching hours, fewer school closings, smaller class sizes, and more homework. The fact that teachers and directors complained about parental intrusion suggests that parents are actively involved in efforts to influence education. Despite the lower socioeconomic status of students and the lower level of training of teachers, PROHECO students performed better on science tests and no worse on math and language tests than students at other schools. Both repetition and drop-out rates appear to be declining (Di Gropello and Marshall 2004).

In the Brazilian state of Minas Gerais, parent-elected community education associations work with public school directors and administrators in managing an extensive after-school program for disadvantaged youth. The program focuses on socialization, tutoring, and curriculum enrichment. The associations manage their own budgets and appoint the school director. Test scores and enrollment, repetition, and drop-out rates all improved at participating schools, and improvement was greater than at nonparticipating schools (Paes de Barros, Mendonca, and Soares 1998).

A study of school autonomy in Argentina found limited effects—except where participation was part of an autonomy package or schools were in poor areas. Standardized test scores rose at autonomous schools in poor areas, suggesting the importance of autonomy and parental involvement in the lowest income areas (Eskeland and Filmer 2004).

In four PROBE (1999) states—Bihar, Madhya Pradesh, Rajasthan, and Uttar Pradesh—parent-teacher associations and village education committees, which were meant to support the public education initiatives, had only a minimal effect. Although marginally more active than parent-teacher associations, the village education committees had an uneven impact across communities,

**Simply
decentralizing
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in perverse
effects**

and where they were effective, their contributions were modest. The research team blamed the top-down nature of the system, which bypassed engagement of the community in defining the role of the village education committees, provided them with little support or resources, and left their responsibilities ambiguous. In contrast, the state of Himachal Pradesh relied heavily on parent-teacher associations and other village organizations to foster and oversee education, identify problems, and seek ways of improving education. The differential impact on enrollment and performance between the four PROBE states and Himachal Pradesh is striking (box 6.2). Although other factors obviously contributed, the PROBE team attributes much of the difference to the attitudes, actions, and performance of parental leadership in schools.

A 1992 policy review by the government of India described a poorly performing educational system with low efficiency and effectiveness, poor retention, low learning achievement, and high wastage (Pandey 2000). Policymakers in New Delhi were responsible for all aspects of education, including hiring and deploying teachers, setting (rigid) standards, building schools, and distributing standardized materials.

The District Primary Education Program, which empowered communities to take charge, offered an antidote to the myriad of central government failures. Rooted in local governments, or panchayats, parent-run village education committees identify needs and constraints, provide space for schools, and manage school budgets. Flexibility in design and implementation allows village education committees to hire their own teachers (without meeting national standards), set compensation (through transfers and local revenue generation), and design programs that meet the full needs of the community. Some states have produced multiple models—offering classes only in the evenings, targeting girl's enrollment, addressing the needs of children with disabilities, and adapting school days to the agricultural calendar.

In India a 10 percent increase in the budget, often used to help teachers develop new or adapt existing curricula to local needs or subgroups, has proven critical to success. The program reaches 55 percent of India's primary school students. All districts made progress in enrollment, particularly of girls, among whom increases in enrollment outstripped boys by a significant margin. Enrollment of scheduled castes also improved, often as a result of providing alternative schooling models. The median drop-out rate fell by half, internal efficiency increased, and learning achievement improved, especially in the early grades. One of the unanticipated outcomes of the program is the enhanced efficiency at the local level. School construction costs have declined, as a result of using local materials. The long-term sustainability of the approach will depend on ensuring cost-effective interventions, dropping unaffordable trappings (such as school uniforms), and raising local revenues (Pandey 2000).

Small studies in El Salvador, Mexico, Nepal, and Pakistan suggest that increasing school autonomy can help reduce teacher absenteeism and increase

Box 6.2
Parent involvement
has produced
remarkable results
in Himachal Pradesh, India

India's Public Report on Basic Education (PROBE 1999) covers all school facilities and a sample of 1,376 households in 234 randomly selected villages in Bihar, Madhya Pradesh, Rajasthan, Uttar Pradesh, and Himachal Pradesh. These five states account for 40 percent of India's population and more than half of all out-of school children.

One of the striking findings of the PROBE survey is the contrast between Himachal Pradesh and the other states. Himachal Pradesh has made remarkable progress toward universal elementary education. The state thrives on social consensus regarding the need for education for all children. Parents overwhelmingly support compulsory education, for both boys and girls, and rank it high on their spending priorities. Between 1961 and 1994, the male literacy rate rose from 21 percent to 94 percent, and the female literacy rate rose from 9 percent to 86 percent. Today Himachal Pradesh ranks among the most educated states in India (UIS 2004).

Himachal Pradesh benefits from a relatively homogeneous population, village communities, and a strong tradition of civic cooperation. The superior quality of education management reflects the political commitment to expanding education. The PROBE researchers found "relatively well-functioning schools even in remote villages where no inspector had reached for months or years. Parents [are vigilant and able] to keep the local teachers and administrators on their toes . . . [There are] stories of villagers resorting to spontaneous agitation (for example, blocking the road or threatening to boycott the elections) to obtain a new school or effect the transfer of negligent teachers" (PROBE 1999, p. 124).

Himachali parents are better informed and more demanding of the schooling system, and they are more aware of the facilities provided to them. This has resulted in better maintenance and upkeep of school buildings and equipment. Cooperation between parents and teachers led to the construction of extra classrooms, the provision of wood for the winter, the leveling of playgrounds, and the upgrading of school buildings.

In the other PROBE states, less than one-fifth of the schools surveyed have a parent-teacher association, and the parent-teacher associations that do exist rarely do more than hold perfunctory meetings. The village education committees have become token institutions from which neither parents nor teachers expect much. Committees built on government directive, an intrinsic problem of an overcentralized education system, often prove ineffective.

Unlike the other PROBE states, Himachal Pradesh made a concerted effort to keep their schools well staffed. The average primary school has more than three teachers, instead of the single-teacher schools more common elsewhere. The pupil to teacher ratio is 27 in Himachal; in the other PROBE villages it ranges from 9 to 172.

Administrative management in Himachal Pradesh is superior to that in the other states studied, in that:

- Few teaching posts are vacant (more than 10 percent are vacant in the other states).
- Salaries are paid punctually (Bihar is infamous for irregular payment of salaries).
- The school calendar is adjusted to the agricultural cycle.
- A proper Board examination is given at the end of class 5.
- School inspectors look for problems beyond just the school registers.
- Schools have well-maintained records, including enrollment and attendance registers; corruption is absent in school incentive programs.

Much remains to be done in terms of the quality and level of education provided. But the virtuous cycle of state support and local community leadership has set a strong foundation for further progress.

**Despite their
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parent
associations
face limitations
in low-income
settings**

motivation (Gaynor 1998). In India and Peru active parent-teacher associations (those that had met in the previous three months) were associated with lower teacher absenteeism (Kremer and others 2004; Alcazar and others 2004).

Not surprisingly, the mere presence of a parent-teacher association does not have a measurable effect on indicators of performance. Controlling for household and community characteristics, in India and Peru the existence of a parent-teacher association had no effect on absence rates of teachers (Kremer and others 2004; Alcazar and others 2004). In the PROBE (1999) states, inactive parent-teacher associations correlated with poor overall performance and a general disregard for education.

In the same vein, simply decentralizing can result in perverse effects. In Zambia decentralization shifted spending from the province to the districts, negatively affecting the equity of fund allocation and crowding out parental and community contributions. Decentralization marginally increased overall funding, but it caused parents to withdraw (Das and others 2004). In much of the CIS, decentralization led to lower national government spending, a decline in aggregate education expenditures, and a rise in formal and informal payments by parents. Lower levels of government were handed responsibilities without commensurate funding. As a result, teacher salaries and complementary inputs declined and drop-out rates began to rise in some countries (Vandeyke 2000; Burnett and Cnობlock 2003).

Despite their potential, parent associations face limitations in low-income settings, and in some cases they have at best a minimal effect on teachers. In Ghana parents did not feel competent to oversee schools, and teachers, who were unfamiliar with collective decisionmaking, felt unsure of their roles (Akukwe 2003).

An innovative program in the Brazilian state of Parana, the school report card program, engaged parents and encouraged them to rate their school, the teachers, and overall performance. Parents attended meetings, but like parents in Ghana they found it difficult to criticize and take on the education establishment. Indeed, they were unsure about what to assess. According to the then Secretary of Education, getting parents to change their perceptions of their roles and their behavior toward schools and teachers is the hardest step (Vasconcelos 2004). This initiative will therefore take time to become effective, but both the process and the result are critical to improving the accountability of school administrators and teachers and to raising performance in the sector.

In rural areas of many low-income countries, flexibility in education policies and approaches is critical to both convincing parents that the investment in schooling is worthwhile and in encouraging them to get involved in decisions affecting their children's education. In Madagascar in response to radio announcements, parents attended meetings about the school and its role given the new financial deconcentration of schools. The community elected a parent-school partnership association, which was given responsibility for financial oversight and school performance. Parents decided to modify the school year

Parents and administrators need information about the effectiveness of their schools

to accommodate agricultural demands, oversaw the budget, and reported the amounts received by the community over the radio. District managers effectively eclipsed the role of parents in teacher hiring, firing, and oversight, however, and reduced their ultimate engagement (Brinkerhoff and Keener 2003).

Improve the information base, especially for parents and communities

Information at the local level. Information is an essential element in local control and accountability. Parents and school administrators need information about the effectiveness of their local schools. Simple indicators of relative performance—spending per child, preparation of teachers, educational outcomes compared with other schools—are essential. Such information is generally unavailable to parents, particularly parents who are most likely to face failing primary schools.

Examples from Brazil and Uganda illustrate the point. In 2001 the Education Secretariat of the State of Parana in Brazil introduced the Boletim da Escola, an annual school report card of the performance of each primary and secondary school under its jurisdiction (www.pr.gov.br/cie/boletim). The report cards seek to increase accountability of the schools and the government to the community. The cards help the community, the government, and the school adopt a shared vision of universal primary education. The report cards also seek to empower parents to participate in the education process and inform decisionmaking at all levels. The report card covers student achievement, parents' opinions (based on a survey), and other information. In 2002 about 1.3 million report cards were disseminated to parents and community members, stirring significant interest. Teachers, parents, and administrators are already using the cards as their primary source of information for implementing solutions and monitoring progress (Vasconcelos Saliba 2003).

A 1991–95 survey in Uganda revealed that only a small fraction of central government funding destined for local schools was actually reaching them. In response, the central government launched an information campaign. Each month data on grants to school districts were published in newspapers and broadcast on the radio. Equipped with such information, local communities were able to monitor the flow of federal funds precisely and effectively. By 2001 fully 80 percent of federal funds was reaching schools. Many other changes were occurring in Uganda during the same period, making it difficult to isolate the impact of the transparency in information. But it is noteworthy that schools with access to newspapers increased their funding on average by 12 percentage points more than schools without access to newspapers (Reinikka and Svensson 2003).

Information at the national and international levels. At the national level, data are required for planning for the education sector as a whole and for deter-

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school children**

mining how it fits into macroeconomic policies. Good data and program evaluations are also essential for designing and assessing the cost-effectiveness and impact of a range of investments and interventions. All countries require reliable national data to craft their sectorwide plans.

Statistics for gross enrollment in primary grades are fairly complete for Africa, and response rates have improved significantly. But the collection of data is interrupted by changes in staff and by economic or social crises. And although response rates remain relatively constant, the particular countries that respond change from year to year.

Enrollment data are weakest for the small island nations of the Caribbean and Pacific. Only about 30 percent of Caribbean countries provide enrollment figures, and only about one-fourth of Pacific island countries provide data on teacher to pupil ratios.⁶ Better vital statistics would have the greatest impact in these island nations.

An acute problem for national planners is the lack of information about the characteristics (other than location of residence) of in-school and out-of-school children. Household survey data are a valuable complement to administrative data. Data on household spending on education, for example, can help planners interpret the impact of government spending on educational outcomes. Household survey data are useful because they cover several areas, including the characteristics and home circumstances of children who do not attend school, home factors that influence attendance at school, and informal and private schooling (including early childhood education), that administrative sources may not.

Survey data can be problematic, however. Surveys are conducted only once every three years, they lack global coverage, and they are generally financed and operated on behalf of donor agencies and may not be integrated into national government policy.

An increasing number of surveys collecting data on education participation have been conducted in developing countries. Efforts have been made to try to harmonize some of the key variables, in order to generate an international database of comparable education indicators. The number of developing countries covered by USAID's Demographic and Health Surveys, UNICEF's Multiple Indicator Cluster Surveys, and the World Bank's Living Standards Measurement Surveys is large and growing.

UNESCO's Institute for Statistics, the lead agency for internationally comparable education statistics, has highlighted many problems with education data. These problems, which reflect underlying weaknesses in national information systems, include the following:

- Data are unavailable: fully 30 percent of countries cannot provide basic education data.
- Time-series data are incomplete.
- Data on particular areas, such as private education, or segments of the population, such as migrant groups, are difficult to obtain.

**Monitoring
of progress
toward the
Goals is needed
to optimally
allocate donor
resources**

- Data are inconsistent, especially where they have been supplied by different ministries. Population data used by the education ministry often differ from the data supplied by the national statistical agency or the data distributed by the UN Population Division.
- International standards and classifications are not adequately implemented, generating data that are not comparable across countries.
- International classifications are changed, making it difficult to compare time-series data.
- Metadata are poor or incomplete, and information on the quality of the data is missing.
- Too much reliance is placed on data from administrative sources, and too few other sources are available with which to validate administrative data.
- Time lags before data are processed and available are long.

The data used by international agencies are inconsistent because of cross-country differences in data-collection methodologies. Because “UNICEF uses enrollment data for most countries and survey data where enrollment data are either not available or are older than the survey data,” UNICEF’s statistics are higher than those of other international agencies. UNICEF estimates that 121 million children are out of school, of which 65 million (54 percent) are girls. “Using different methods—enrollment and attendance—helps get us closer to the real number of children who might be denied their right to an education, and so in need of intervention” (2004, p. 7).

At the international level, monitoring of progress toward achievement of the Goals is needed to optimally allocate donor resources. Monitoring helps international agencies assess the effectiveness of policy and programmatic changes. Good data also help coordinate activity among partners. While poor performance in the education sector may not retard international rhetorical support, it certainly prejudices aid flows.

Reliable, accessible data are also required from donors if planning for education at the national level is to be sound. The UN Joint Inspection Unit has noted the difficulty of obtaining “a single set of comparable and accurate data on the level and amount of assistance provided to primary, basic education by the various actors, bilateral, multilateral, regional and financial institutions in 2002” (Bertrand 2003, p. 10) “Methods for attributing aid to basic education are not clear and consistent (should teacher training, for example, be counted as support to tertiary or primary education?). Funds pledged for new initiatives may represent transfers from existing assistance rather than increases in aid.

Evaluate learning outcomes

The ability to measure what the education sector produces—that is, learning outcomes—is weak. Instead, the focus is typically on the number of children in seats or even children’s names on class rosters.

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Enrollment and completion indicators are not necessarily good or consistent predictors of outcomes. A 1999 study of six African nations reveals a range of relationships (Ellis 2003). Kenya had the lowest completion rate, at 63 percent, but 65 percent of its sixth grade pupils achieved minimum literacy skills—a better outcome than in any other country. Malawi's completion rate was almost identical to Kenya's, at 64 percent, yet only 22 percent of its sixth grade pupils demonstrated minimum literacy skills.

National outcome measures are an important indicator. But it is important to go beyond averages and disaggregate results by region, gender, ethnic group, and socioeconomic status to identify weaknesses within a particular segment of the population.

Direct assessment of what children have learned in school can be undertaken in a number of ways. A national examination system can be designed to assess children against a national standard (acquisition of a national curriculum or acquisition of sufficient knowledge to move on to secondary school). Under a national examination system, the number of students who pass the exam is sometimes limited to the number of places available in secondary school.

Another option is a national learning assessment. Rather than testing children against a certain standard, this kind of test involves directly assessing what skills they have acquired.

A third option is an international assessment. This is a test that is controlled to test equivalent skills acquisition across a group of countries, so that countries can benchmark themselves against each other or a regional average. Comparability is ensured by taking into account the relevant national and subnational cultural context.

The most robust test of acquired learning that provides international comparability is a full international learning assessment, such as the System for the Measurement of Educational Quality (SIMCE, developed in Chile), the Southern and Eastern African Consortium for Monitoring Educational Quality (SACMEQ), or the OECD's Program for International Student Assessment (PISA). Because administering and analyzing the results of such tests are very resource intensive, it is unlikely that they can be undertaken often. Moreover, the results of these tests may not be fully comparable at the global level, because of cultural differences in interpreting questions. Testing also raises the prospect of reducing the output of schooling to the ability of students to answer questions on standardized examinations and of providing incentives to teachers to simply "teach to the test."

Strengthen the role of civil society organizations

Civil society organizations play a major role in advocating for children and parents and in holding local governments, national governments, and international organizations to their commitments (see appendix 2). These organizations engage in advocacy, service delivery, and sometimes both. They are

Civil society organizations play a major role in holding local governments, national governments, and international organizations to their commitments

particularly effective in the areas of community participation, empowerment, literacy, community schools and development centers, and reproductive health and early childhood education (UNESCO 2001).

Civil society organizations are active at the local, national, regional, and international level. At the local level, the Le Minh Xuan Commune is a network of unsuccessful state farms southwest of Ho Chi Minh City, Viet Nam, that has left thousands of families unemployed and children out of school. To provide basic education to children who left government schools, Friends for Street Children founded the Le Minh Xuan Development Center. Friends for Street Children provides uniforms, books, and school supplies to children from poor families. The curriculum includes literature, math, natural sciences, health, vocational training, and family-centered activities. Parents meet monthly with teachers to keep informed of their children's progress (Global Fund for Children 2004).

In rural Bangladesh the Dhaka Ahsania Mission creates community development centers to respond to the demand from the local community for learning life skills among adults and adolescents. Established in 1981, the program, called Ganokendra, has created more than 1,150 community development centers, which offer literacy programs (Dhaka Ahsania Mission 2004). The program targets women. The Movement for Alternatives and Youth Awareness (MAYA) is a nongovernmental organization at the local community level in India working to reform education through community ownership. MAYA's Prajayatna Process addresses issues of quality in 15,000 government schools in six districts in the state of Karnataka by working with students' parents, school committees, the education bureaucracy, and the state bureaucracy. This method of participation in school governance incorporates the culture and characteristics of local communities and trains excellent facilitators and volunteers with leadership skills. Karnataka registers relatively high levels of enrollment and retention in comparisons with other regions in India, and MAYA has been successfully scaled up in the state. The model of community participation is replicable in different contexts after redesigning to take into account the culture and context of each community.

At the international level, the Global Campaign for Education and the national civil coalitions affiliated with it in the North and the South play a strong advocacy role, urging developing country governments to abolish primary school fees and increase government spending on education, while pushing for increased debt relief and aid from donor countries. The African Network Campaign on Education for All builds the capacity of African civil society to reach the goal of free and good-quality education for all by engaging civil society in the national and international dialogues on such issues as gender equity and the impact of conflict on education. It also monitors and evaluates the achievements of Education for All targets. ActionAid UK helps communities secure education rights and ensure that schools are places where education

**Strengthening
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that manage
and deliver
education
services
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huge challenge**

is respected. They hold governments accountable and assist them in developing practical, innovative, and flexible solutions. They hold international agencies, such as the World Bank, and developed countries accountable for their promises on education funding.

Implications for strategy 2

Strengthening the institutions that manage and deliver education services represents a huge challenge, particularly because weak education institutions are typically only part of widespread weakness in public administration. However, the experiences highlighted above suggest that, depending on local conditions, countries can take specific actions, including the following:

- Develop, strengthen, and bolster the constituency for a national commitment to education with a legal and institutional framework that places high priority on public sector provision of quality education.
- Promote mechanisms for local control of education, in which parents and other citizens are given an explicit role in holding schools and teachers accountable for delivering results.
- Improve the quality of information about education sector performance, so that the agents and agencies charged with planning and monitoring have accurate and up-to-date knowledge of how many children are in school, how many teachers are employed and on the job, whether children are remaining in school, and so on.
- Institute systems to assess the acquisition of skills and knowledge based on an international standard. Ensure transparency in the dissemination of this information, at both the national and local levels.
- Create an environment in which civil society organizations are recognized as legitimate participants in debates about the direction of the education system.

Financing the education Goals

Achieving universal primary education and gender equity at the primary level will cost more than is currently being spent by developing country governments and the international aid community. How much more varies across regions and countries and depends on the assumptions used to estimate costs.

Recent studies estimate that putting every child in the world in a good-quality primary school would cost \$7–\$17 billion a year (Delamonica, Mehrotra, and Vandemoortele 2001; UNESCO 2002; Oxfam International 2001; Devarajan, Miller, and Swanson 2002; Bruns, Mingat, and Rakotomalala 2003; and Sperling 2003). These very rough estimates probably understate the full costs of the expansion, quality gains, and special programs, including subsidies to poor households, that are critical if all children are to complete primary school (box 7.1). And they ignore the cost of expanding opportunities for postprimary schooling, without which it is unlikely that all parents will see the value of having their children complete primary school.

These and other studies share several findings. First, all of them indicate that recurrent costs, not capital investments, represent the bulk of required funds. In a detailed study of 47 low-income countries, Bruns, Mingat, and Rakotomalala (2003) estimated that 90 percent of the total costs of meeting the Goal are recurrent costs. They concluded that even if donors financed all of the incremental capital costs in those countries through 2015, an even larger volume of donor aid would be needed to support countries' recurrent spending. Donors must redress the fact that their assistance to education goes largely to capital expenditures (World Bank 2003b).

Second, although the incremental costs needed to meet the Goals are large, countries should be able to finance a significant share from domestic resources. UNICEF assumes that countries will increase education spending by 1.1 percent a year between 2000 and 2015. Bruns, Mingat, and Rakotomalala show

that if all low-performing countries matched the fiscal effort of those countries making the fastest progress, even low-income countries might cover 60 percent of the incremental costs (and 80 percent of the total costs) of achieving the Goals. UNESCO (2002) is more pessimistic about the capacity to mobilize domestic funding, but it, too, assumes that national resources will outweigh international assistance.

Third, differences across countries and regions are extremely large in terms of the affordability of reaching universal primary enrollment as well as the external financing needs. In Sub-Saharan Africa external aid will have to

Box 7.1
Calculating the
cost of providing
universal primary
education is tricky

Initial estimates of the costs of providing universal primary education were very rough, based on average costs per pupil and the number of children out of school. Such calculations underestimate the cost of achieving universal primary education, because they focus on enrollment rather than completion, graduation, or other endpoints more closely aligned with the goals of a well-functioning primary education system. These improvements require enhancing quality as well as simply extending service to more students.

In principle, the estimates could overstate the costs of expansion, since they assume that marginal costs will be equal to current average costs. In fact, marginal costs could decline (by filling urban classrooms, for example, adding more students at no extra cost in teacher time and little extra cost in books). In the poorer countries, it is more likely that the estimates understate costs, however, as marginal costs may rise (if, for example, expansion implies building new schools and paying more to teachers in rural areas).

Simple calculations generally focus on the primary education sector, without taking into account the potential need for investments in secondary and postsecondary education needed to increase the value of completing primary school and increase the supply of primary school teachers. Moreover, simple estimates usually neglect the costs of implementing policies in other areas that could have a substantial impact on reaching the goal of universal primary schooling, such as “roads and other basic infrastructure or broader policy and institutional changes.” Simple estimates also ignore the costs of programs and policies aimed at reducing gender discrimination, even though the magnitude of gender discrimination will affect enrollment, the supply of teachers, and the quality of benefits of schooling.

Recent estimates have improved on the initial efforts by addressing one or more of these issues. Most studies now aggregate total requirements from regional or country-level estimates and calculate annual spending based on the required flow of children into the school system. They also separately calculate recurrent and capital costs, and some incorporate changes in average costs and quality over time.

All of the studies are subject to the same data limitations. Population data necessary to estimate the size of student cohorts are weak in the low-income countries of interest; student enrollment data are notoriously unreliable due to poor recordkeeping, repetition, and poor attendance; and costs per pupil are confounded by inadequate information on budget expenditures, numbers of employed teachers, wage information, and private expenditures. These problems notwithstanding, improvements in methodology have generated better estimates of the global requirements for achieving universal primary enrollment than were previously available.

play the largest role. African countries will need 76 percent of the total donor resources required, and South Asia will require 16 percent; other regions will require much less donor assistance (Bruns, Mingat, and Rakotomalala 2003). Currently, only 33 percent of donor resources for education go to Sub-Saharan Africa. In Ethiopia, Tanzania, and many other Sub-Saharan African countries, even with a doubling or tripling of domestic primary spending, reaching the Goals will require very large increases in external aid.

Table 7.1
Bilateral and
multilateral
commitments to basic
education, 2001–02
Millions of dollars

Source: OECD Creditor Reporting System 2004.

Donor	Commitment
Bilateral donors	
Australia	20
Austria	1
Belgium	8
Canada	57
Denmark	16
Finland	6
France	28
Germany	42
Ireland	10
Italy	1
Japan	78
Luxembourg	7
Netherlands	194
New Zealand	2
Norway	32
Portugal	4
Spain	21
Sweden	16
Switzerland	12
United Kingdom	84
United States	163
Subtotal	803
Multilateral donors	
International Development Association	212
Asian Development Fund	57
UNICEF	50
African Development Fund	39
Inter-American Development Bank	15
European Commission	5
Subtotal	379
Total	1,182

**The timing
and depth of
changes and
other politically
delicate
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effective
will greatly
affect costs**

Fourth, the range of estimates is partly a function of different assumptions about the quality of programs and the extent to which countries introduce the institutional reforms and policy adjustments that could reduce costs (while extending opportunities). Even with new resources, the education Goals are not reachable without major changes in institutional arrangements and improvements in the efficiency of education spending in developing countries. Efforts must be made to reduce repetition, allocate sufficient resources to complementary inputs, maintain facilities, and use multigrade schools and other strategies to keep class size at efficient levels. In some low-income countries, teacher salaries should be reduced (though in an equal number of schools they should be raised). The timing and depth of these changes and other politically delicate steps to make systems cost-effective will greatly affect costs.

Even assuming maximum additional effort by developing countries themselves (such as annual increases of more than the 1 percent mentioned above), a large funding gap is implied by these numbers. This gap will need to be filled by external financing, if progress is to be made. In 2001–02 bilateral and multilateral donors contributed about \$1.2 billion in external assistance for basic education (table 7.1). Estimates of what is needed and what could be absorbed vary, in part because of the wide range (\$7–\$17 billion) of estimates of total costs, including countries' own spending. However, it is certainly plausible that in the next four years countries could absorb an additional \$5–\$6 billion a year in external funding, particularly because not all of these estimates fully take into account the costs of scholarships and other demand-side programs necessary to ensure completion, including increasing access to postprimary education. The Global Campaign for Education estimates the external resource requirement at least \$10 billion. But even this figure may understate the full cost, given that at least some of the additional students completing primary school will go on to secondary school.

Some donor efforts may raise the profile of education. In 2004 the United Kingdom pledged to spend £1 billion to meet the education Goals over the next four years. Prime Minister Tony Blair's Commission on Africa will issue a report in 2005 to guide decisions on policy and funding in the region; education, particularly for girls, seems to be a priority. France has also committed to increase its education spending over the next few years, although it has not offered specifics. In 2003 the Netherlands, an early leader of the Fast Track Initiative, committed nearly \$235 million over three years to start the Catalytic Fund—providing support to countries that have been without strong external funding—to which other donors have started to contribute.

3

**Forging an international
compact for education: roles
and responsibilities of donors
and developing countries**

A global compact for basic education

The additional resources needed to ensure that all girls and boys complete primary school are surprisingly small. At the high end, estimates of total additional needs are only \$17 billion a year—\$48 billion less than what the United States spent on military operations in Iraq in 2004—most of which will be raised and spent by developing countries themselves. The financing gap—estimated at \$5–\$6 billion a year—is a pittance in international terms. In the poorest countries in the world, where aid is needed, the private and social returns to assistance would be large, and education, done right, could be a critical contributor to broader social and political change. Improving conditions in these countries would help secure a more just, fair, and secure world—something that is in the interest of people everywhere.

Achieving the education goals requires bold action on the part of countries at risk and on the part of the donor community. Granting tens of millions more children access to school and an education of good quality requires much more than additional financing—indeed, the annual financing gap that donors need to fill is a tiny portion of the total donor spending needed to achieve all the Goals (\$135 billion in 2006 and \$195 billion by 2015, according to the UN Millennium Project's (2005) *Investing in Development: A Practical Plan to Achieve the Millennium Development Goals*).

Meeting the Goal requires something rarer and more difficult to measure: bold political leadership in both developing countries and rich donor countries. This leadership can and must be forged in the context of a global compact in which the roles and responsibilities of donors and developing countries are clear and mutually agreed upon. This compact must then be translated into specific targets and benchmarks set by individual countries, with clear commitments from donors to the ongoing financing of countries' progress. In this compact each side is accountable to the other for doing its part. Donors

**The donor
community
also faces
governance and
institutional
challenges
in the way
it delivers
external
support**

make a serious commitment and respond to countries that are doing things right, assured that external resources are being used well. Developing countries take on tough political reforms, with the confidence that they will have sufficient—and sufficiently predictable—financial support to deliver on their promises to their citizens.

Chapter 5 described the deep-seated institutional and governance problems that education systems face in many developing countries. Meeting these challenges requires political will, not just resources. The donor community also faces governance and institutional challenges in the way it delivers external support, which have dramatically reduced the real value of their transfers to developing countries (Birdsall 2004). These problems have afflicted the education sector as much or more than other sectors. They include the following:

- Collusion and serious coordination failures at the country level, which impose high transactions costs on recipient countries that must deal with hundreds of donor agencies. Education officials in such countries as Honduras and Tanzania often manage dozens of different projects in basic education alone, with differing monitoring, reporting, procurement, and disbursement rules.
- Lack of interest in long-term capacity building, with spending heavily concentrated on technical assistance and short-term training, using high-cost donor contractors.
- A longstanding lack of interest in serious evaluation of the impact of donor support on actual results for children in school, measured in terms of learning, and an emphasis on disbursement and assessment of inputs.
- Reluctance to commit to predictable long-term financing at the sectoral level. Instead, donors engage in destructive competition among themselves for visibility of their projects, and they poach the limited number of highly trained and motivated local staff.
- Continuing reluctance to finance recurrent costs, even though for the poorest countries recurrent spending constitutes investment in a better future.
- Inability or unwillingness to limit large transfers of committed funds in the event of a political change that brings an irresponsible or incapable government to power. When engagement is still possible, it should take the form of dialogue and support of efforts by civil society to check political abuses and restore accountable leadership.

In 2002 donors took the first steps toward addressing these problems in the education sector. Under the umbrella of the Education for All Dakar Framework for Action, they worked with officials from developing countries to set up the Fast Track Initiative. Fast Track focuses on achieving the goal of universal completion of primary school in a selected set of countries in which leadership and commitment to education have already produced visible progress.

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If it can be made to work, the Fast Track Initiative could help coordinate donor funding and provide broad sectoral support of national education plans. Perhaps more important, the initiative introduces an entirely new approach to donor financing: namely, financing that is predictable for the next decade, as long as countries are making progress against mutually agreed-on benchmarks, set out by the country's leadership, publicly discussed, and made fully transparent and visible. Key are predictable financing linked to steady progress toward agreed-on benchmarks.

Predictable financing would give developing country leaders the confidence that they will have partners and resources if they take on politically courageous reforms. It would encourage long-term investments in expanding teacher training, incorporating programs of auditing and expenditure monitoring into education systems, testing the effects of block grants to communities and giving communities more control over hiring of teachers, developing targeted programs of cash subsidies to poor households contingent on their keeping children in school, and so on. It would also permit countries that are currently too poor to cover the incremental recurrent costs of their new investments to do so. While not a solution alone, additional and predictable resources are critical in maintaining quality when developing countries eliminate tuition and other fees or expand postprimary schooling. Without additional resources such welcome changes have led to overcrowded classrooms and acute teacher shortages, undermining the credibility of political leaders and the confidence of parents in the value of schools. Financing that is tied to agreed-on benchmarks can provide donors with the opportunity to engage with national governments in defining the concrete outcomes that constitute progress rather than wrangling over the specifics of reform and institutional change that ultimately make a difference only when shaped by the countries themselves.

What donors should do

The major work to achieve universal primary education is in the hands of developing countries, which can draw on the lessons from the remarkable successes achieved in many countries. Evidence is also emerging about problems with management, performance, and incentives, problems that developing countries can solve only by making hard choices and taking political risks. Actions are required within the education sector as well as in the broader political and economic policy environment.

Donors and international technical agencies can support positive and progressive change by strategically increasing their level of financial commitments and by improving their policies and practices. The task force has four major recommendations for donors:

- Support bold political leadership and provide firm financial commitments to make Education for All and the Fast Track Initiative work.
- Reform the donor business. Commit new funds in a new way: through a strong, coordinated global effort that rewards and reinforces countries' measurable progress.
- Report on donor commitments and actions through a transparent accountability framework.
- Invest in genuine evaluation of education sector interventions.

Recommendation 1: support bold political leadership and provide firm financial commitments to make Education for All and the Fast Track Initiative work

In 2005 G8 leaders should issue a major statement supporting global education with serious contingent commitments. The more than 30 separate donors and international agencies working on education should meet their existing commitments for countries already selected for the fast track and make explicit their

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expected future commitments for additional countries to provide the certainty and predictability necessary to encourage countries to adopt strong Education for All plans. The expected resource needs estimated by the Fast Track Initiative Secretariat, expected funding commitments, and actual disbursements by donors should be made public.

The Fast Track Initiative has so far not achieved its ambitious aspirations, and there have been some rocky moments of legitimate debate and disagreement over specifics. It is crucial, however, for all parties to continue to strive to build a strong and lasting process (box 9.1).

In 2002 donors committed to enacting the kind of compact described in chapter 8 in support of basic education in a selected number of countries to put these countries on a fast track of progress. The resulting Fast Track Initiative is premised on the mutual accountability built into a compact: donors need to be held accountable for their financial commitments and national leaders for reforming their education systems, with financing and reforms hand in hand in support of each other. By rewarding ambitious country-level reforms with equally ambitious increases in donor assistance, the Fast Track Initiative has the potential to create strong incentives for countries. It is the world's best chance for making rapid progress toward meeting the education Goals in the poorest countries.

The Fast Track Initiative got off to a rocky start. On November 27, 2002, the first seven countries were endorsed for financing (the lead donors of each country appear in parenthesis): Burkina Faso (Canada), Guinea (France and the United States), Guyana (the United Kingdom), Honduras (Germany), Mauritania (the World Bank), Nicaragua (the World Bank), and Niger (Canada). In 2003 the Gambia, Mozambique, Yemen, and Viet Nam were endorsed; Ghana was endorsed in 2004. Each of these 12 countries has prepared an education plan. But financing—firm and predictable donor commitments for funding for specific countries over the next several years tied to specific country plans with agreed-on benchmarks—is lacking. What is needed is an upfront commitment now from donors, quick action to come to agreement on country plans and benchmarks, and the roll-out of initial programs. Donors also need to commit now to sustain their financial support beyond the next few years, to adjust their support in line with progress, and to add to it as they develop similar agreed-on programs with additional countries through 2015.

If the international community is serious about reaching the educational Goals, massive funding—on the order of spending on HIV/AIDS—needs to be committed; the paltry sums currently committed to basic education will not help most countries meet the Goals. Although HIV/AIDS funding still falls short of its ultimate needs, billions—not millions—of dollars are committed. Without a similar shift in scale, the gap in education financing cannot be closed.

Donors should immediately come forward with bold, firm, and monitorable commitments to the Fast Track Initiative, at a minimum pledging steady

Box 9.1
The Fast Track Initiative has enormous potential, but problems have limited its effectiveness

Building on the Monterrey framework, the Fast Track Initiative introduced global benchmarks for evaluating the quality and long-term sustainability of countries' Education for All plans and their efforts to improve education system efficiency and outcomes. To maximize the benefits of a global compact while minimizing the transactions costs and disbursement lags of creating a new fund entity, donors agreed to channel additional financing through existing programs.

The Fast Track Initiative represents a crucial effort to create a coordinated global process for this vital Goal. But the lack of predictability in donor financing has so far made it disappointing to developing countries and advocates who expected that it would accelerate progress toward the Goals. From the point of view of countries hoping to receive additional commitments, the approach has not yet yielded predictable long-term funds. It has still taken a year (full budget cycle) or more for donors to translate new commitments into disbursements, and lacking clear donor transparency or pledges into a visible, multiyear global fund, both the overall volume of donor commitments under Fast Track Initiative and, crucially, their sustainability over time has not been clear. These problems have limited eligible countries' involvement in the Fast Track Initiative: of the first 18 countries invited to participate, only 12 have been endorsed.

The Fast Track Initiative has succeeded in fostering donor alignment and coordination around a single, coherent, country-led education sector plan. This is no small accomplishment, given the track record of donors in uncoordinated, project-by-project support in countries, with financing that has historically been ad hoc and unpredictable, often undermining rather than supporting a country's own programs of expansion and reform.

For the first time in any single sector, the education Fast Track Initiative puts countries in the driver's seat in their dialogue with donors, creating a global-level forum in which donors and recipient countries can coordinate policies and track progress. It has done much to harmonize donor support at the country level, by promoting pooled funding, joint supervision, and common-format reports, reducing transactions costs for recipient countries. It has created a Catalytic Fund, managed by the World Bank, to provide bridge funding for countries that are ready to expand education but have too few active donors to generate the needed funds. And it has proposed a new trust fund to support the development of education sector plans and build capacity in the least developed countries.

The Fast Track Initiative is the only multilateral vehicle available for inspiring a larger number of successful donor-country partnerships to accelerate progress in education. Its potential is underscored by the positive effect it has had in shifting donors toward more coordinated support for country-driven plans. The jury is still out on whether its potential will be realized. Much depends on donors' willingness to commit now to funding, country by country, a clear trajectory of financing tied to agreed benchmarks of progress.

annual increases from their current level of official development assistance for education. Together the G-7 nations should be able to mobilize a substantial portion of the external financing needed over the next several years.

The processes for funding proposals, the planned approach to meet the policy challenges, and gaps in funding need to be specified and made public. While flexibility is desirable, the nature of the process requires some standardization and transparency. The Secretariat of the Fast Track Initiative should make these processes and agreements public. Doing so entails engaging with

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civil society, both generally and within countries, to ensure harmonization and inclusion of all players. Greater transparency would provide clarity for countries interested in participating in the Fast Track Initiative. Given the confusion at the start, such efforts deserve more attention now.

Recommendation 2: reform the donor business

The Fast Track Initiative will not work unless donors complete the difficult process of reforming the way they commit and disburse funds. There are two issues. First, despite modest progress in a few countries and among a few donors, donors do not work together to support country-driven programs. Instead, they compete within countries for the limited time, attention, and own-country funds to support “their” projects.

Second, under pressure to eschew the failed past approach of policy conditionality, donors have not made clear and transparent their expectations of performance on the part of recipient countries. The first two years of discussion in the Fast Track framework have prompted some complaints that expectations of donors about policy and efficiency reforms have been left too vague. As a result, the process has not come close to the momentum needed for real progress toward the Goals. Because donors have not yet made genuine commitments—because of lack of political will, the absence of real confidence about countries’ ability to implement their proposed plans, or simply lack of immediate financing from their aid budgets that they could use for education—countries that have worked hard to develop plans are inhibited from pursuing major access and quality reforms, because of uncertainty over whether they will have sustained and predictable funding.

Donors need to take the lead in working with the fast-track countries, country by country, on a planned trajectory of financing tied to agreed-on benchmarks of progress. To do so, donors need to change their way of doing business. Donors need to pool their financing of country’s own education plans, they need to be willing to finance recurrent costs as well as new investments, and they need to provide adequate support for long-term capacity building (with benchmarks measured in terms of intermediate outcomes, such as placement of recently trained local education budget managers or school directors).

Recommendation 3: use a transparent accountability framework for reporting

Under current reporting arrangements, it is extremely difficult to track and account for donor spending in education. Much donor aid is in nonmonetary form (in-kind contributions, technical assistance), and the difference between the amount allocated in a foreign assistance budget and the amount that gets to the ground level for program inputs is large. To date no system has been developed that allows the international community to determine whether spending by particular donors is or is not filling the gap between what is

There is an urgent need to better understand how well-specified interventions and reforms work to increase enrollment, retention, and learning

needed and what national governments are able to provide. Similarly, there is no system for reporting on whether policies and practices correspond to current imperatives and agreements on donor harmonization.

The Fast Track Initiative can play an important role in this regard. Proposals for an explicit donor accountability framework are on the table but have yet to be implemented. The task force proposes the following recommendations:

- Donors should invite civil society organizations and developing country governments to participate in reviewing the proposed framework for donor accountability. If warranted, the instruments should be modified to increase transparency and policy relevance.
- Donors should commit in writing to report under the accountability framework and to do so annually.
- Information from donors should be maintained on the Fast Track Initiative Secretariat website (www1.worldbank.org/education/efafti/) reported in the Education for All Monitoring Report, and widely publicized.

Recommendation 4: invest in genuine evaluation

Given the volume of national and donor resources devoted to education, there is an urgent need to better understand how well-specified interventions and reforms work to increase enrollment, retention, and learning. This can be done only if those responsible for setting spending priorities insist on a sound evidence base and help fund the generation and analysis of relevant data. Several recent examples (including the Progreso/Oportunidades program in Mexico and small-scale school health interventions in other countries) attest to the feasibility and potential for policy impact of rigorous evaluation. Multilateral banks, including the World Bank, require that 1 percent of all loan proceeds be used for evaluation. All donors should adopt such requirements. Just as important is ensuring that these resources are applied to evaluation programs that use sound methodologies. Too often the policy value of evaluations is compromised by weak evaluation design or failure to collect baseline data. Equally important, findings must be made public and broadly disseminated, whether they are favorable or not.

One approach to the chronic challenge of evaluating development programs is the creation of an independent facility for funding and bringing visibility to the results of rigorous impact evaluation. This facility, which could be supported by foundations and donor governments, would contribute to the global public good of knowledge by making funding available for the design and execution of evaluations for a subset of donor-funded projects. An independent, earmarked source of funds could eliminate or reduce the tension between implementation and evaluation that has hampered evaluation initiatives within donor agencies. In addition, an independent facility would have the ability to disseminate evaluation findings and make available evaluation data in a way that development agencies are unlikely or unable to do.

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An independent facility is unlikely to be created overnight; many questions of governance and practice would need to be worked out, and donors would have to play a role in the facility's governance. In the meantime, since research independence in designing and carrying out evaluations is so important, agencies should work together in some form of consortium that could help ensure the rigor and independence of evaluations, no matter which donor is supporting the program in question. Such a collaborative effort could also bring more visibility to the results of rigorous impact evaluation.

The task force proposes two recommendations:

- Donor agencies should increase their investment in rigorous impact evaluation, with an emphasis on measuring learning outcomes. The results of the evaluations should be made widely available through electronic and other means.
- Donor agencies should assess the feasibility of establishing a mechanism for independent evaluation of donor-supported interventions and create a pooled trust fund and quality assurance mechanism to support rigorous impact evaluation of education sector projects and programs and widespread diffusion of results.

A call to action

With more than 100 million children currently out of school, heroic efforts, not “more of the same,” will be needed to achieve the Goals. If the strategy taken by donors and developing country governments is simply to expand the existing education systems as quickly as possible by providing more financial resources, history strongly suggests that countries with relatively low levels of primary school enrollment and completion today will be in roughly the same situation in 2015, ready for the next round of international goal setting. If, however, the global community views this challenge as an opportunity to take a new, creative, and transformative approach to thinking about both education and the relationship between donors and poor countries, success is possible, not just within education but in broader social and economic outcomes as well.

This report suggests several potential levers for transforming (rather than just expanding) education systems. Systematic consultation with expert groups, civil society representatives, policymakers, and other stakeholders may reveal other, better levers. The point is not to define a closed and universal list—all genuine solutions must come from locally defined processes—but to be clear about the need to identify specific actions that induce a fundamental reorientation in failing education systems.

Commissioned papers for education report

Topic	Author
The Long Walk to School: International Education Goals in Historical Perspective	Michael Clemens
Global and Regional Initiatives	Prarthna Dayal
Data Issues	Simon Ellis
Education in the MENA (Middle East and North African) Region: A Progress Report and What Lies Ahead	Sabeen Hassanali
The Business Case for Investing in Education in Developing Countries	Julie Kennedy
Community and Parental Involvement in Education: Does It Matter?	Maureen Lewis
Inventory/Review of Evidence about Major Education Initiatives	Maria Beatriz Orlando
Donor Response to EFA/FTI	Gene Sperling
Summary of Civil Society E-Consultation	Akanksha Marphatia

Summary of the civil society e-discussion on the education report of the Task Force on Education and Gender Equality

The UN Millennium Project Task Force on Education and Gender Equality gathered input from a variety of perspectives on an earlier version of this report to help prepare its final report.¹ This e-discussion was one of the primary opportunities initiated by the task force for civil society organizations around the world to influence these reports.

Executive summary

The task force contracted with ActionAid International, who partnered with the Commonwealth Education Fund, the Global Campaign on Education, and One World South Asia to launch the e-discussion. As the lead partner, ActionAid International hired a moderator for the discussion and provided managerial support. The Commonwealth Education Fund participated by providing managerial support and by reaching out to its large constituency of staff worldwide. One World South Asia provided the discussion platform, training for the moderator, and technical support for the website. Finally, the e-discussion group built on the Global Campaign on Education's consultation (and member list) on critical issues in basic education over the past year.

The universal primary education Goal and report e-discussion took place from July 12, 2004 to August 1, 2004.² The dialogue attracted more than 1,300 participants, although not all contributed to the e-forum. In total, 57 responses from 17 countries were received. Barring multiple messages sent by any one person, 51 people participated. Twenty-seven of these were men and 20 were women.

In addition, more than 100 participants took part in the Spanish discussion on August 4, 2004. The French language discussions, held August 5–6, 2004, did not yield many responses. Both the gender equality and education reports were discussed and key documents were translated.

Discussion summary

Overall, participants applauded the task force's call to make education transformative, and there was excitement about the document's calling for a change in how business is usually conducted. But participants noted that the report fell short of guiding how to transform education and what needs to change. One participant said, "This report should be the one that argues the essential and unique role of education both as a fundamental right and as the fundamental enabling right, which helps people secure and enjoy other basic rights. This one intervention is critical to reaching all the Millennium Development Goals" (D. Archer, United Kingdom). With past education targets having failed, the report should better guide how to achieve universal primary education by 2015. Governments sign on to commitments easily but there are no mechanisms to hold them accountable. These reports and the Millennium Development Goal Summit in 2005 should look at how to ensure enforcement and not just make new promises. In Latin America, though, most governments and decisionmakers are simply not aware of the Millennium Development Goals, so they cannot be held accountable for not reaching them.

Participants felt strongly that there should be both acknowledgment of the crucial role that civil society can play in achieving universal primary education as well as specific recommendations for their role. Both history and contemporary experiences have shown how strong social movements (including trade and teacher unions, nongovernmental organizations, and other civil society organizations) have motivated governments to ensure universal primary education. In Dakar it was agreed that governments would develop national Education for All plans in consultation with citizens and civil society and that donors would then come in to provide consistent and coordinated support. A platform where parents, students, and teachers can advocate changes with policymakers at the local, district, national, and even international levels needs to exist.

Recommendation 1: support women's right to education—not only as a means to an end for wider social change

The saying "Educate a woman and you educate a nation" may have increased attention on women's roles and contribution to children's education and well-being, but it also has framed women's value in socioreproductive roles, thereby reinforcing gender stereotypes.

Recommendation 2: support women's education programs

The report needs to explicitly support flexible and participatory approaches to women's education. The message was left "empty"—with the report justifying the important roles mothers play in children's education and overall well-being but not following through on a recommendation for supporting women's literacy initiatives.

Recommendation 3: recognize the value in education and do not reduce it to a debate over a “number of years”

The task force was urged to recognize that a lot of work still needs to be done on primary education and that unless a drastic transformation takes place, universal primary education by 2015 will be out of reach. Questions were asked about the congruity between this Millennium Development Target and the Dakar declaration, which provides a full agenda for education from early childhood to adult education.

Recommendation 4: propose changes to address the fundamental financing obstacles to achieving universal primary education

Funding obstacles include International Monetary Fund (IMF) conditionality limiting government expenditure on education, which may undermine the potential of new aid modalities such as the Fast Track Initiative. A criterion ensuring a transparent and accountable allocation of funds distributed through any funding channel was recommended. Civil society should be involved in monitoring and evaluating the use and impact of these funds. With an organized development compact, there are dangers of government being more accountable to donors than their own parliaments and citizens.

Recommendation 5: hold governments held accountable for providing education

The involvement of the private sector is inevitable and even successful in some countries. But private schools rarely open their doors to the poor. The government therefore has an even greater role to play in improving public school quality and holding private schools responsible for providing high quality education to more than just the elite.

The complete report on the e-consultation can be found at: <http://www.unmillenniumproject.org/html/tf3docs.shtm>.

Success stories in policy interventions toward high quality universal primary education

The purpose of this background paper commissioned by the United Nations Millennium Project Task Force on Education and Gender Equality is to provide information about a wide range of education interventions that are documented as successful by institutions with recognized worldwide expertise on education policy.¹ These interventions have objectives that are in line with the Millennium Development Goals in Education and Gender Equality, which entail increasing enrollment and completion for boys and girls, improving education quality, and improving education equity. The emphasis of the paper is on interventions that are currently under implementation or projects that were implemented during the 1990s. The main limitation of this compilation of successful interventions is the lack of systematic impact and cost evaluations.

The paper is organized according to basic education intervention types, by operating level, following Levine and others (2003): education sector reform, school effectiveness, household demand, and students' preparation and health. Considering information limitations, the paper further organizes interventions within each category into three groups: successful interventions (programs that have been rigorously evaluated), promising interventions (identified as best practices even though the evaluation is not rigorous), and interesting interventions (innovative programs that are too new or scarcely documented).

Education sector reforms

- Chile: Education reforms.
- Pakistan: Balochistan Primary Education Project.
- Colombia: Vouchers in Colombia.
- Ethiopia: Education Sector Development Program and Basic Education Systems Overhaul.
- India: District Primary Education Program.

- Brazil: Money Straight to the School.
- Nicaragua: Decentralization.
- Colombia: Licenses to operate schools in Bogota.

Two successful but opposite approaches coexist in education sector reform. On the one hand, some countries have adopted systemwide, top-down reforms that integrate management improvements, decentralization, and finance reform. This approach has been particularly successful in the cases of countries undergoing political transformations (Uganda, for example) or reformers that were able to count on a strong political commitment by the president or the minister of education. An appropriate communications strategy, the involvement of different groups as reform agents, and decisive legislative change (when required) are also keys of education reform success. On the other hand some successful bottom-up education reforms have occurred by increasing the flexibility of the overall system to incorporate small or medium-size local innovations that have high potential for replication and scalability (India Districts Reforms and Balochistan Province Reforms).

Improving primary school effectiveness

- El Salvador: EDUCO Program.
- Chile: School evaluation and rewards system.
- Bangladesh: BRAC Education Program.
- Guatemala: Nueva Escuela Unitaria.
- India: MAYA community ownership for better schools.
- Dominican Republic: Multiphase program for equity in basic education.
- Venezuela: Radio interactive mathematics for basic education.
- Various locations: Teacher training programs; community participation; multicultural, multilingual, and bilingual education; application of information and communication technologies to education; programs to accelerate learning and compensatory programs; and focusing on girls.

Increasing community participation, especially direct parental involvement in school governance, leads to great results. Several effective teacher-training models can be successful, depending on the context. However, high-impact training programs were a long-term ongoing process and offered teachers a support network. New technologies can be effectively used to enhance school effectiveness or to provide training to teachers.

Increasing household demand for basic education

- Mexico: Progresa/Oportunidades.
- Bangladesh: Food for Education.
- Nicaragua: Red de Protección Social.
- Brazil: Bolsa Escola.

- Honduras: Household allowance program.
- Uganda: Elimination of school fees.
- Malawi: School waivers for girls.
- Various locations: Child labor programs.

These interventions tend to have very significant impacts and be very cost effective. Effective targeting is the most important key to success in this type of intervention. Another important policy lesson from these experiences is their efficient and accountable management. Governments implementing these transfers successfully counted on pre-existing institutional capacity to reach remote areas.

Focusing on students' preparation and health

- Kenya: Primary School De-worming Program.
- Bolivia: Integrated Child Development Project.
- Eritrea: Integrated early childhood development.
- Kenya: School meals.
- Egypt: Sesame Street goes to Egypt.
- Mexico: Initial Education Program.
- Bosnia and Herzegovina: Schools for pregnant women.

These interventions can have a high impact on student performance. Successful implementation of health and nutrition programs in schools depends on effective diagnosis, simplicity of treatments, and effective targeting. Successful implementation of early childhood development programs depends largely on the institutional capacity of the health and education system and the provision of maternal health.

Conclusions

- Many successful interventions have integrated approaches combining education reform elements with school effectiveness interventions or household demand interventions with student health and nutrition interventions.
- Most resources from the donor community have been traditionally devoted to financing education sector reforms. Should more international resources flow towards specific programs in the areas of school effectiveness, household demand, and nutrition and health of students?
- The replication and scale-up of these successful programs poses new education system management challenges.

The Task Force on Education and Gender Equality identified the need for a survey of recent successful education policy interventions in the developing world, in terms of the targets set by the Millennium Development Goals. The Millennium Development Goal framework entails significant increases in enrollment and completion in primary education, as well as gender parity in education (Levine and others 2003). The main obstacle to the identification

of “successful” policy interventions is the lack of systematic impact and cost effectiveness evaluations. The lack of systematic evaluations also introduces a report bias in any survey of education policy interventions because there are more sources of information and policy analysis publications about programs that have been evaluated or studied systematically compared with other programs that may have equal or greater potential.

The purpose of this background paper is to provide key information about a wide range of interventions that are documented as successful by institutions with recognized worldwide expertise on education.² The emphasis of the paper is on interventions that are currently under implementation or projects that were implemented during the 1990s.

The paper is organized according to basic education intervention types, by operating level, following Levine, Birdsall, Ibrahim, and Dayal (2003): education sector reform (sectorwide reforms including changes in education management, provision, and financing), school effectiveness (interventions focusing on direct education inputs to improve learning in the classroom), household demand (reduction or elimination of school fees and direct targeted transfers to help families pay for education), and students’ preparation and health. Each intervention type includes programs designed to increase enrollment and completion for boys and girls, improve education quality, or improve education equity. The paper does not include interventions geared towards education provision in emergency situations (displaced children, armed conflicts, or natural disasters)

Considering information limitations, the paper further distributes interventions within each category into three groups:

- Successful interventions: education programs that have been identified as successful based on a scientific evaluation of their net impact (employing randomly selected treatment and control groups or rigorous statistical analysis). In addition, education programs that have been identified as best practices, even if partially evaluated, due to fast or effective achievement of their stated goals.
- Promising interventions: education programs that have been identified as best practices or poster cases by any of the sources due to their good results in terms of equitable basic education. These programs lack systematic impact evaluations and information on their effectiveness.
- Interesting interventions: education programs that are new or scarcely documented, but use innovative approaches that may be very informative for education policy discussions.

The paper summarizes the following information (when available) for each successful or promising intervention:

- Name of the initiative.
- Specific aims and objectives.
- Operating level.

- Geographic focus and context.
- Time period for implementation.
- Outcome or impact information, or information from any evaluation.
- Key of success.
- Assessment of quality of information and limitations of the methods and data.
- Cost and cost-effectiveness.
- Funding sources.
- Reference materials and source of information for summary.
- Potential scalability or replication in different contexts.

For interesting policy interventions only the name and objectives of the intervention are presented. Each section contains an introduction and a selection of successful, promising, and interesting interventions. The conclusion highlights some common trends on successful initiatives by intervention type and the implications of these trends on the international donor community.

Education sector reforms and basic education

Education sector reform programs have a long history of counting more failures than successes, partly due to their complexity, design problems, insufficient financing, lack of institutional and managerial capacity within the system, and distorted labor markets for teachers (UNESCO 2002). It is also the education intervention that has received the largest share of multilateral funding (World Bank 2001, 2003). Traditional education sector reforms focus on curriculum reforms and reforms on education administration. During the last decade, education reforms have included decentralization in provision, management, and financing. Recently, a few countries have implemented school vouchers on a small scale. School vouchers affect household demand but are included in this section because their main objective is improving education sector management, quality, and cost effectiveness.

Successful interventions in education sector reform

Education reforms in Chile

Initiative: Full School Day Initiative (Extension Jornada Escolar).

Specific aims and objectives: The market oriented top-down reform of the 1980s (decentralization, universal attendance per capita grants) notably increased efficiency in the education system as well as public and private spending in education.³ Once a democratic government was in power in 1990, the main objective of education reform was to build on previous successes and address remaining problems, such as inequities in education and new problems arising from reforms (teachers' salaries, training, and overall career development).

The first democratic administrations started a series of reforms to increase the quality of primary schooling and to address inequities of access and quality by income level. As part of the overall reform, the Full School Day Initiative aimed to eliminate double-shift schools by 2002. School hours were increased from 30 to 38 hours in basic education. During the extra hours both the students and teachers were involved in more interactive activities and training. The reform had several components: teacher training and involvement, improved teacher salaries, new infrastructure (about 20,000 new classrooms necessary to guarantee access), curricula reforms, and an improved student achievement evaluation system. During the late 1990s, and currently, new stages of reform had the objective of building on the quality improvements at the school level and improve performance across all dimensions.

Operating level: Ministry of Education and municipal education authorities. Municipal education authorities played a central role.

Geographic focus and context: Urban and rural. Chile is at a relatively advanced stage of educational development, with enrollment ratios similar to those of developed countries. Inequities in access and quality were, and are still, relatively high. In 1992 coverage of basic education in the poorest quintile was around 92 percent and in the richest quintile was around 99.8 percent. The reforms were part of the presidential political agenda of the democratic administrations that followed the Pinochet dictatorship (the Aylwin, Frei, and Lagos administrations gave continuity to education reform as a national priority).

Time period for implementation: Education reforms in Chile have persisted for more than two decades, surviving the transition to democracy and several administrations. There are three well-defined reform cycles:

- Market oriented top-down reform (1980–90).
- Promoting equity and quality through bottom-up reform (early 1990s).
- Providing institutions to support quality improvements (linking bottom-up and top-down reform) (late 1990s and current).

Outcome or impact information, or information from any evaluation: The Full School Day had been adopted by 50 percent of government-subsidized schools by 1998. Evaluations of the reform report increases in coverage and average learning outcomes as measured by national annual standardized tests. Average learning outcomes increased by 20 percent between 1990 and 1996 in municipal schools. Outcomes increased by 25 percent in private-subsidized schools and by 7.5 percent in private (full tuition) schools during the same period. Chilean children (grade 3) scored third in a 1998 assessment of student outcomes in Latin America and the Caribbean by the United Nations Educa-

tional, Scientific and Cultural Organization. Average years of schooling have increased for all income groups during the 1990s. However, the gap between the highest and lowest quintiles is still significant in primary education and relatively large in secondary school.

Keys to success: The program had continuity and built upon previous successful financial and administrative reforms, such as decentralization and per capita grants (a type of voucher system). On the other hand, reforms were able to review previous policies and modify them according to the new requirements of society (double shifts were effectively implemented to increase coverage in the 1960s, but in the 1990s coverage is high but quality was suffering). Political commitment to the reforms at the presidential level (Eduardo Frei called himself “the education president”). The design of the Full School Day Initiative was of high quality. The communication strategy of the Full School Day Initiative suffered some false starts but finally was able to convey the main objective of the reform and generate high expectations in the public. Negotiation with reorganized teacher unions gained support for the reform and the ability to attract human capital to the teaching profession at the cost of increasing salaries and centralizing labor contracts (which was hard on the municipal education authorities). In order to improve quality, the recent reforms focused on the school and its production process (education inputs: teacher training, adequate infrastructure, relevant curricula and activities, and learning measurement). Other education inputs that were enhanced through specific interventions include school meals, basic health care, and school supplies. Positive discrimination in the grant system improves equity. Redefined public and private roles drastically increase and optimize investment in education. The program has been implemented in a transparent manner and has contributed to the development of Chile’s private school sector.

Assessment of quality of information and limitations of the methods and data: High-quality reports. Evaluations were based on national learning achievement data that were generated as a component of the reform. Even though progress is evident during the 1990s, it is hard to compare with the progress during the 1980s. Studies are needed that control for socioeconomic characteristics of the students.

Cost and cost-effectiveness: Increasing the flow of resources for education was essential to improve quality. Both public and private investment in education increased during the 1990s. Public spending per pupil in basic education increased by 78.5 percent between 1990 and 1996. Public and private education spending represented 7 percent of GDP in 1998, while in 1990 it represented 4.6 percent. Private spending was 3.1 percent of GDP in 1998 and only 2 percent of GDP in 1990.

Funding sources: Government of Chile and World Bank.

Reference materials and source of information for summary: Delannoy (2000); PREAL (2002).

Potential scalability or replication in different contexts: It would be difficult to replicate the Chilean experience on education reform as a whole. One reason is that it would be extremely hard for a democratic government to implement the efficiency reforms that were dictated during the 1980s. However, many elements of the Full School Day Initiative could be replicated in different contexts (reduce double shifts in school, increase the number of activities in school, improve teacher training).

Balochistan Primary Education, Pakistan

Initiative: Balochistan Primary Education Development Program.

Specific aims and objectives: Increase access to education for girls. Improve the quality of primary education. The comprehensive reform included: restructuring education management to create a strong base for education reforms and access to girls, improving education quality through teacher training and curriculum reforms, and involving communities in expanding primary schooling for girls.

Operating level: Province of Balochistan Education Authorities.

Geographic focus and context: The reforms took place primarily in the rural areas of Balochistan province, one of the most underdeveloped areas of Pakistan. Geographic implementation barriers were significant, since Balochistan has a small population (approximately 6.5 million in 1998 census) scattered in remote rural areas in a vast territory. Most villages do not have paved roads, telephones, or electricity. The population is ethnically diverse, with four languages spoken in the region in addition to the official national language, Urdu. Reformers also faced pervasive financial mismanagement within the local public sector.

Pakistan literacy and enrollment rates are very low, especially for women in rural areas. Balochistan province has traditionally registered lower literacy and enrollment rates and less access for girls than the country's average in both urban and rural areas: only 10.3 percent of the province's population was literate by 1981.

Inequities between boys and girls were dramatic in Balochistan. Throughout the 1980s literacy rates for women in Balochistan's rural areas were 1–2 percent. Girls' enrollment in Balochistan during 1990 was only 25.4 percent the enroll-

ment of boys. Addressing inequities towards girls' education was a daunting task because, for cultural reasons, parents preferred that their daughters be taught by female educators and only 8.3 percent of primary schools were for girls. Female educators were very scarce in rural Balochistan due to historical lack of education opportunities for local women and the fact that urban female educators were unwilling to relocate to rural Balochistan.

Time period for implementation: 1990–98.

Outcome or impact information, or information from any evaluation: The initial targets of the program in terms of increases in enrollment for girls were exceeded before the end of the reform period. The number of primary schools for girls increased from 503 in 1990 to 1,719 in 1997 (an increase of 241 percent). The number of girls enrolled in primary school increased to 208,053 (from about 80,000). Dropout rates for girls have fallen and completion rates increased from 7 percent to 30 percent. The increases in education quality have also had a positive impact on boys' enrollment (which increased by 23.8 percent) and secondary school enrollment (Anzar 1999). Increases in quality, curriculum reforms, training of teachers, and administrative reforms have had permanent impacts on the province's education system.

Community involvement through a program called Community Support Process also has had a substantial positive impact on school quality and the efficiency of the whole system. Kim, Alderman, and Orazem (1998) report that this component of the reforms, in and of itself, is responsible for an increase in girls' enrollment of 22 percentage points and an increase in boys' enrollment of 9 percentage points.

Keys to success: The reforms were very successful in the implementation phase, achieving concrete results at a fast pace: survey research on the demand for girls' education and other factors affecting girls' enrollment; management restructuring by establishing a Directorate of Primary Education with complete fiscal and human resources autonomy; significant growth in the number of women educators and administrators; in-service basic training of all the 8,000 untrained teachers in Balochistan using mobile training units; and curriculum reforms immediately reflected into 34 new high quality activity-based textbooks written by local professionals with the help of international consultants.

These remarkable achievements were possible due to several essential elements: All change agents had a deep understanding of the education system in Balochistan and its challenges. A partnership existed between donors, government, nongovernmental organizations, and local communities. The provincial government and donors consulted extensively during the design phase, and the

government was able to negotiate conditionality clauses. Parental involvement in the communities was key in the selection of teachers and the building of new schools, as was sending their children to school as soon as there was an appropriate facility. Synergy existed between program policies and implementation strategies. Conditions set by local governments and donors focused on gender equality, female teachers, teacher training, and reaching rural areas. Long-term commitment and stability existed. Changes were implemented gradually allowing time for reflection and corrective action if necessary. Training and technical assistance to local actors was flexible enough to incorporate lessons learned in the field. Multiple institutions and actors involved in the reform diffused opposition attempts. Female leadership was key to promoting female education. An integrated approach included reform elements, household demand elements, and student preparation elements.

Assessment of quality of information and limitations of the methods and data: High-quality reports on the whole reform process and an evaluation study of the Community Support Process. The evaluation team gathered data implementing a rigorous survey. Using statistical and econometric methods, they compared children who were beneficiaries of the program with their statistical counterfactual or a comparison group sharing the same initial characteristics as children affected by the program that provided a “simulated control” group (ex post matched comparison method). This method provides a good estimate of the impact of the program but cannot observe and quantify the full impact (results may also be biased in some circumstances).

Cost and cost-effectiveness: The World Bank committed approximately \$120 million for the program in 1993. There is no information in the consulted sources on cost-effectiveness.

Funding sources: United States Agency for International Development (initial stages), United Nations Children’s Fund, World Bank, and the Provincial Government of Balochistan, Pakistan, were the major donors during the 1990s. Because of the success of the reforms, more donors have since joined: Asian Development Bank, the government of the Netherlands, Trust for Voluntary Organizations, Habib Bank Trust, and local nongovernmental organizations.

Reference materials and source of information for summary: Anzar (1999); Kim, Alderman, and Orazem (1998).

Potential scalability or replication in different contexts: The Balochistan reforms provide lessons for education policies aimed at permanently reaching target groups in remote rural areas. This set of reforms showed that it is possible to achieve significant girls’ enrollment changes in a short period of time when

policies take into consideration institutional, geographic, and cultural elements, at both the design and implementation phases.

Vouchers in Colombia

Initiative: Targeted Education Voucher Program (PACES).⁴

Specific aims and objectives: The main objective of PACES was to increase the transition rate from primary to secondary education by addressing the shortage of space in public schools faced by poor households in large urban areas. The idea was to allow poor students to take advantage of the existing excess capacity in private schools. Voucher resources could be used by private schools to increase capacity and enroll eligible students. Only low-income households (households in poor neighborhoods) were eligible to participate, and students had to apply to qualify for a voucher after they had been admitted to a private secondary school. Vouchers could be used to pay for tuition in private schools that participated in the program but did not cover all of the cost of secondary education (the rest was covered by households). Municipalities and schools could choose to participate or not. The choice of municipalities was based on administrative capacity and the number of potential private schools that could participate as well as the number of primary education graduates and the current supply of public secondary education.

Operating level: Central government, Ministry of Education, municipal level, and private education sector.

Geographic focus and context: During the 1990s Colombia registered very high primary school enrollment and completion rates. The main problems of the Colombian education system arise from inequity issues. One of these inequities is the lack of capacity of the secondary education public system to absorb primary education graduates, which limits education opportunities for the poor. Ultimately, the lack of opportunities beyond primary schooling affects overall education demand among poor households. Municipalities were already managing schools and education policy in their jurisdictions as part of decentralization reforms that preceded PACES. Private schools were already enrolling 40 percent of secondary education students by 1992 and were able to expand enrollment. Targeting was achieved by using poverty maps and accepting voucher applications only from low-income neighborhoods.

Time period for implementation: 1992–98.

Outcome or impact information, or information from any evaluation: The program had a large positive impact on many aspects. More than 216 munici-

palities participated in the program. By 1996, more than 1,700 private schools were participating. Nonprofit schools, vocational schools, and schools charging moderate fees had a higher probability of participating than did other private schools. Schools that had very low fees were already affordable to the poor. Low-fee private schools usually offered lower quality than schools with moderate fees that became accessible to poor students thanks to the vouchers. Vouchers were distributed to 125,000 students from poor households and covered about half the total cost of secondary education. Students who participated in the program were compared to a control group of eligible students who did not get the vouchers (randomly allocated among applicants). Students using vouchers were more likely to complete the 8th grade, less likely to repeat grades, and scored better on mathematics and language standard tests than the control group.

Keys to success: Income targeting using poor neighborhoods and poverty maps was good. Participation choice was completely open for municipalities, schools, and households (municipalities, schools, and households that participate are those that can implement the program well and reap its benefits). The private education sector provision was highly developed in some urban areas of the country. Schools that wanted to participate provided quality that was at least as good as the best public school in the area.

Assessment of quality of information and limitations of the methods and data: High quality impact evaluation studies. Evaluations included institutional aspects, program design, school quality, and net impact of the program on enrollment and completion. A randomized evaluation with treatment and control groups was used, since many vouchers were allocated by lottery among applicants who fulfilled targeting requirements. Standardized tests in mathematics and language were used to assess school quality.

Cost and cost-effectiveness: There is evidence of high cost effectiveness for this intervention. PACES vouchers' value was about \$190 in 1997, while the total tuition and fees costs of private schools were \$340 on average. On the other hand, the average annual per-student expenditure in the public secondary school system was over \$350 (and parents paid about \$58 extra). Compared with an equivalent expansion of the public education system, the voucher program increased annual public expenditure by \$24 per participating student. These extra public costs and the additional private cost incurred by households were exceeded by the current market value of additional educational attainment (by 1996). However, the total cost of the program may have been too high to be financed by the Colombian government after the pilot phase ended. Another explanation for the discontinuation of the program may have been a change in education authorities and the identification of the program with some political actors.

Funding sources: The World Bank financed the pilot phase and part of the costs of the program during the first years of implementation. Most of the resources for vouchers were provided by Colombia's central government. Municipalities financed 20 percent, and some private schools also financed a portion. The voucher program also increased private investment of households in education by an average of 70 percent of the value of each voucher.

Reference materials and source of information for summary: King and others (1997); Angrist and others (2001).

Potential scalability or replication in different contexts: The program did not continue in Colombia despite its good results because it may have encountered financial scalability problems. The successful implementation of vouchers requires a highly developed education private sector and high pre-program enrollment rates.

Promising interventions in education sector reform

Basic Education Systems Overhaul and Ethiopian Education Sector Development Program

Initiative: Basic Education Systems Overhaul (BESO) and Ethiopian Education Sector Development.

Specific aims and objectives: The Ethiopian reforms had three wide goals: reach universal primary education by 2015, improve education quality, and improve education system efficiency and financial sustainability.

Operating level: Ministry of Education and regional education authorities in 11 regions.

Geographic focus and context: In 1991, a coalition led by the Ethiopian People's Revolutionary Democratic Front (EPRD) ousted the Mengisto Regime (Mengisto had concentrated power under a socialist platform since 1974). After the first elections in decades, the EPRD had the mandate of reforming the country including its deficient education system. The primary gross enrollment ratio was under 20 percent. The female enrollment rate was below 12 percent. In addition to this very low average achievement, education in Ethiopia had severe geographic inequities because the country comprises very diverse regions inhabited by distinct ethnic groups with different languages.

Time period for implementation: 1991–2002.

Outcome or impact information, or information from any evaluation: The case of Ethiopia is one of the few successful systemic reforms in Sub-Saharan Africa.⁵ The reform was flexible enough to incorporate new knowledge from each of the components of the system and use this knowledge toward the goals of the reform. The wide reforms successfully increased public spending on primary education in absolute terms. The Ethiopian government was particularly effective at distributing resources to schools in an equitable manner across regions. Successes were reported in reaching remote rural areas, building new schools using hollow concrete blocks (shown by economic analysis to be preferable to traditional mud and thatch structures), involving the community in school building construction and management, reaching excluded ethnic groups with a curriculum that fits their needs (local languages), providing teacher training, increasing number of trained female teachers, improving gender sensitivity in curriculum development, improving the quality of the curriculum, and increasing availability to high quality and current textbooks.

These activities were responsible for an increase in the overall primary enrollment ratio from 20 percent in 1991 to 57 percent in 2001. The female primary enrollment rate increased from 12 percent in 1991 to 47 percent in 2001.

These reforms were less successful in improving efficiency (reducing repetition rates, for instance) and reallocating resources in the education system toward primary education.

Keys to success: The administration in charge of implementing the first phase of the reforms had a strong political commitment. The education system was opened to accommodate several innovations happening simultaneously. There were high levels of technical cooperation and technological transfer. Administrative decentralization led to better responsiveness of the system to regional needs. Community involvement was important.

Assessment of quality of information and limitations of the methods and data: The wide education reforms in Ethiopia are considered a success story in several reports by organizations that are involved in the funding and implementation of all the project activities. One of the reports is an economic analysis of World Bank education projects and project outcomes based on a sample of 104 education projects between 1993 and 1998. Projects are evaluated according to their design (analysis of alternatives, fiscal impact, quality of cost-benefit analysis, beneficiary assessment and poverty analysis, and institutional risk analysis), and their implementation results. A report by the United States Agency for International Development analyzes the results of the specific policies and programs implemented through the reforms as well as the general characteristics of the reforms in several countries of Sub-Saharan Africa (Benin, Ethiopia, Guinea, Malawi, and Uganda). However, none of the reports used systematic impact evaluations (Moulton and others 2001).

Cost and cost-effectiveness: Reforms were financed by conditional donor support (\$93.3 million), which represented about 14 percent of initial public expenditure over the life of the program. An essential part of Ethiopia's wide-ranging reforms was its effective administrative decentralization in the country's 11 regions. Thanks to this decentralization and the negotiation of a funding plan for regions through grants and loans (funded by the World Bank), the Ethiopian government was particularly effective at distributing resources to schools in an equitable manner. The incentives of the reform were consistent with high cost-effectiveness at the region and school level, but there is no empirical evidence on the consulted sources. On the other hand, it took the Ethiopian government a long time to reallocate money toward primary education.

Funding sources: World Bank, United States Agency for International Development, and UNICEF provided funding. The Academy for Educational Development, American Institute of Research, CARE, Research Triangle Institute, Save the Children, UNICEF, and World Learning provide technical expertise and project management for different components of the reform.

Reference materials and source of information for summary: Basic Education Coalition (2003); Moulton and others (2001); Research Triangle Institute (2003); and Vawda and others (2001).

Potential scalability or replication in different contexts: The education sector reforms in Ethiopia combined in-depth decentralization with overall increase in quality through simultaneous innovations in specific areas (curriculum development, teacher training, and textbooks in local languages). Community participation helped build new schools and increased male and female enrollment. The flexible Ethiopian model is a reference for poor countries with significant regional differences. An important element of its success was the strong political commitment to the reforms. The survival of the new party in power depended in part on the success of these education reforms; hence, this type of commitment was idiosyncratic.

India District Primary Education Program

Initiative: District Primary Education Program.

Specific aims and objectives: India's wide spectrum education reform had four simultaneous objectives: to increase coverage of primary education (increase enrollment and retention, especially in remote areas); to increase equity (reduce differences in enrollment by gender and social strata to less than 5 percent); improve education quality (increase learning achievement by 25 percent over measured baseline levels); and increase efficiency (reduce waste of financial

resources, reduce primary education completion time, reduce dropout rates to less than 10 percent).

Operating level: Decentralized design and management. Education Ministry, state, and district education authorities participated in the project design. Operating level was the district.

Geographic focus and context: India has pursued universal elementary education since independence, with notable progress. However, by 1991 the literacy rate was only 52 percent. In addition, 33 percent of all children ages 6–14 were out of school. Severe gender inequalities were a big challenge (two-thirds of all out-of-school children were girls, and female literacy was only 39 percent). These dismal results coexisted with a country-wide primary school network that had the capacity of reaching 95 percent of the school-age population. High dropout rates and low quality were responsible for the low overall education completion relative to capacity.

Time period for implementation: 1995–99.

Outcome or impact information, or information from any evaluation: Positive results of the program include improving access, quality, retention, learning achievement, and system efficiency. The initial pilot phase of the program started in seven states (covering 11 percent of all primary students). The program has been successfully scaled up to reach about 55 percent of India's primary school population. Enrollment in the districts that are included in the program has increased at a faster rate than in nonprogram districts. Enrollment increased 5.5–6 percent in districts that participated in the program. Enrollment of girls increased faster than enrollment of boys in the districts that participated in the program.

The program used an index of social equity as a monitoring tool. This index has improved significantly because of the gains in access by low-caste children and groups living in remote areas. Internal efficiency, measured by the average actual years to complete primary school relative to the ideal number of years, improved in the districts that participated in the program. Dropout rates and repetition showed some reductions, but the evaluating team faced significant data challenges to measure these variables. Learning achievement, measured by standard language and mathematics tests, improved significantly in the districts that participated in the program.

Other benefits of the reform were improvements in school construction, community participation, capacity building, better trained teachers, and spread effects (textbooks and teacher training packages produced during the reform are also used in districts that did not participate in the other activities of the program).

Keys to success: Great design and flexibility allowed the program's design to adapt to specific factors during pilot phase with sufficient preparation time. There was a focus on student learning along with decentralization and local empowerment. Continuous learning and education were emphasized. External agents were used as consultants to catalyze change. Constant capacity building and reaching to latent capacity in the community helped improve education (through workshops and contacts).

Assessment of quality of information and limitations of the methods and data: High quality reports. Impact of the reform is obtained by comparing the evolution of schooling in districts that participated in the program with districts that did not participate in the reform. This method could overestimate or underestimate the net results of the reform.

Cost and cost-effectiveness: Program expenses represented only 10 percent of total annual spending in primary education.

Funding sources: Government of India and World Bank.

Reference materials and source of information for summary: Sharan Pandey (2000); World Bank (1999).

Potential scalability or replication in different contexts: This reform was scaled up with great success. The experience of India with these fast-paced and wide-ranging reforms can be achieved in countries that face the challenge of expanding access and at the same time improving the system's quality.

Interesting interventions in education sector reform

Money Straight to the School, Brazil, 1995–present

Brazil has undergone several education reforms that have included decentralization efforts. This initiative supports decentralization and school autonomy by enhancing school financing capabilities. This initiative has had encouraging results in the state of Minas Gerais, where the state gave local communities a space in school governance by enacting mechanisms of participation in school boards. In addition to a basic budget, each school receives a grant based on enrollment. The board decides how to allocate resources from the grant and also raises money locally for additional school improvements.

Decentralization in Nicaragua, 1993–present

Nicaragua's education sector reform gave more managerial and financial autonomy to schools and their school boards. Overall results indicate efficiency gains. However, results vary greatly depending on the environment sur-

rounding the school and school management. Funding for this project was provided by the World Bank.⁶

Licenses to operate schools in Bogota, Colombia

The objective of this project is to appoint the management of each newly built school in a poor area to a team of education managers working in a high quality private school near the area. Licenses are allocated through a competitive and transparent process for 15 years. Licenses are renewable after an evaluation. When the project is in full operation, the license system will reach 45,000 children (4 percent of all public schools in Bogota).

Improving primary school effectiveness

Efforts to improve learning in the classroom include a broad range of interventions focused on direct education inputs and developing school-based management. According to the evidence on education inputs and education results in developing countries, the list of effective interventions on school inputs includes initial and ongoing teacher training, improving the quality and availability of teaching materials (teacher guides and textbooks), improving the schools' physical plant (presence of toilets, blackboards, chairs), keeping students actively involved (asking comprehensive questions and stimulating interaction), raising the number of days and hours in class, increasing the percentage of female teachers, and lowering the pupil-teacher ratio.⁷ Interventions aimed at improving school management include greater parental and community involvement, establishing school evaluation systems, and linking school financing to performance. In this section we also include some interventions to improve education effectiveness through distance education and technology within formal schooling.

Successful interventions in school effectiveness

EDUCO Program, El Salvador

Initiative: EDUCO.

Specific aims and objectives: Provide basic education to remote rural areas that were severely impacted by civil war. The program started by providing basic education up to the third and fourth grades. The main feature of the EDUCO program is the strong involvement of parents and the community in the governance of each school and the provision of inputs for education. EDUCO's principles are share the responsibility of basic education coverage with the local community, promote the participation of rural poor communities in the design and administration of education services (in order to have the services more tailored to their needs), decentralization and more efficient administra-

tion than traditional rural schools, and improve teacher supervision through parental involvement. Each EDUCO school is administered by a community association made up of parents and teachers. Members of the association are elected every three years by community members and are responsible for hiring and firing teachers, monitoring teacher performance, manage all school funds (bank account that receives transfers from the Ministry of Education), fundraising for school improvement programs outside the official budget, and generate and coordinate community efforts to improve the school through volunteer services.

Operating level: EDUCO's national coordination program is in a branch of the Ministry of Education. EDUCO also has coordination offices at the regional level. Each community association interacts with the corresponding EDUCO regional coordination office and also with other branches of the education system independently.

Geographic focus and context: Rural remote areas in El Salvador that were affected severely by the civil war. In these areas there were about half a million children with no access to basic education. El Salvador registers relatively low average years of schooling in rural areas (5.7 in the year 2000) for both men and women in comparison to middle-income countries. However, El Salvador registers higher average years of schooling in rural areas than Guatemala, Honduras, and Nicaragua (ECLAC 2000).

Time period for implementation: 1991–2003.

Outcome or impact information, or information from any evaluation: EDUCO is a success story in increasing education coverage in remote areas quickly. By 1997, EDUCO schools had about 194,000 children enrolled. The program was managed at the school level by 1750 ACEs (1997) in different regions. EDUCO schools have worse building infrastructure and less experienced teachers than do traditional rural schools. On the other hand, they counted on more educated teachers and more textbooks per child than traditional rural schools. Parents devote more time to school meetings and children's homework under the EDUCO model. Teachers devote twice the time to meetings with parents. Educational outcomes of children in EDUCO schools in remote poor rural areas are not statistically different from children in traditional rural schools. The program has been effective at targeting the poorest rural households.

Keys to success: EDUCO introduces accountability and co-responsibility to education administration. The program was very well designed (based on a UNESCO study). Coordination of the community association network by the Ministry of Education. The community associations had independence

in their budget management and hiring decisions. Some challenges remain in order to develop better contracts for EDUCO teachers.

Assessment of quality of information and limitations of the methods and data: Rigorous evaluation methods. The methodology of the evaluation was an ex post matched comparison between the population covered by the program and an equivalent group not served by it. The data were generated using a special survey, student learning tests, and existing household surveys. Econometric analysis of the baseline data also controls for household characteristics and selection (selection of a particular community by the government). The main limitation of this methodology is that evaluation was not incorporated in the design of the program from the beginning and that the participant community selection is not random. Thus, differences in inputs and performance could be, in part, related to geographic and socioeconomic factors outside the program.

Cost and cost-effectiveness: The annual cost per EDUCO student was about \$85 compared with \$73 per traditional primary school student in 1992. The program has increased public and private investment in education.

Funding sources: World Bank and the government of El Salvador.

Reference materials and source of information for summary: World Bank (1997); PREAL (1999); and Uemura (1999).

Potential scalability or replication in different contexts: EDUCO is a success story in increasing education coverage in remote areas quickly. Currently the program is expanding to other geographic areas and is including up to the 6th grade of basic education. Some aspects of this program could be applied in poor and marginalized areas in other developing countries.

School Evaluation and Rewards System, Chile

Initiative: System of Measurement of School Quality (SIMCE) and National System to Evaluate School Performance (SNED).⁸

Specific aims and objectives: The system of school evaluation and rewards was implemented with the objective of monitoring school quality. A second objective is to provide incentives to quality improvement at the school level. While achieving the previous objectives, this integrated evaluation and rewards system contributes to the dissemination of good practices among similar schools and throughout the country. The SNED provides merit awards to basic and secondary schools. The awards must be used as bonuses to teachers. School performance is measured by an index containing six factors: effectiveness (absolute

SIMCE scores based on students' results on standard tests in language and mathematics and integration of students with special needs); improvement (change on SIMCE scores); initiative (teachers' workshops and participation in the governance of the school); working conditions; equality of opportunity (rates of retention and promotion, incorporation of students from poor households or with severe educational deficits); and integration of teachers, parents, and guardians in school governance. The highest weight is on school effectiveness (approximately 40 percent of total score). Schools are stratified in groups using statistical cluster analysis according to the socio-economic level of the community they serve, rural or urban location, multigrade school or traditional school, and other criteria. Schools compete only with schools in the same homogeneous group.

Operating level: Ministry of Education, Regional Education Authorities, and District Level Authorities.

Geographic focus and context: Urban and rural. Chile is at a relatively advanced stage of educational development with enrollment ratios similar to those of developed countries. Inequities in access and quality were, and are still, relatively high. The country has undergone three consecutive wide range education sector reforms (see previous section). The last wave of education reform emphasizes quality improvement and better work conditions for teachers.

Time period for implementation: Student Assessment System: 1988–present; School Evaluation System: 1995–present.

Outcome or impact information, or information from any evaluation: Evaluations suggested that the system is a powerful tool for school improvement and problem diagnosis. Awards offer significant help to teachers, especially those working in remote areas. The evaluation and award system is perceived by teachers and school directors as fair. Evaluations showed that the stratification of schools into homogenous groups is highly desirable. Detailed interviews suggested that homogeneous groups should be established within each region and not the country as a whole. Evaluations suggested ways of improving the system.

Keys to success: The country has had a national student assessment system for more than 15 years (SIMCE) that is the basis for the evaluation and awards. Schools are stratified and competition only takes place among schools with similar characteristics. In the same strata the awards are fully competitive, and schools can win consecutively. Awards go to school establishments (avoiding incentive problems associated with merit pay to individual teachers). The award is paid directly to all teachers as a bonus. Design and evaluation were

careful. Teachers and school directors are involved in the design and evaluation of the system.

Assessment of quality of information and limitations of the methods and data: High quality reports and government evaluations. The evaluation methodologies of these studies had the objectives of assessing the system and improving its design. The evaluations contributed significantly to the design and further improvement of the evaluation and awards system. However, the evaluations provided little information on the net impact of the reward system on student's performance.

Cost and cost-effectiveness: Sources do not provide information on cost or cost-effectiveness.

Funding source: Government of Chile.

Reference materials and source of information for summary: McMeekin (2000) and PREAL (2002).

Potential scalability or replication in different contexts: This large-scale initiative is replicable in countries that do not have dramatic regional disparities in terms of language and culture. In the case of Chile, education varies greatly by income level and urban versus rural residence. These factors were used to stratify schools into homogeneous groups and stimulate competition among equals, while preserving the national character of the evaluation system. The last wave of education reform in Chile emphasizes quality improvement and better work conditions to teachers. These preconditions were favorable to an evaluation and rewards system.

BRAC Education Program, Bangladesh

Initiative: Bangladesh Rural Advancement Committee (BRAC) Education Program.⁹

Specific aims and objectives: BRAC is one of the most innovative programs in the last two decades. Instead of trying to bring children who are out of the school system to the system, this initiative brings the most effective school possible to out-of-school children (both children who had never attended school and primary school dropouts). The main objective of BRAC was to create schools that would be accessible to poor children in rural areas. The program has a special emphasis on increasing the participation and attainment of girls in poor rural areas. BRAC schools have several characteristics in common: Each school consists of 30 children living within a 2 kilometer radius of the school that

have not been reached by the formal education system. The primary education model delivers basic literacy and numeracy in a three to four year period. Short and flexible hours allow children to help their parents on the fields or at home. Little or no homework is assigned. There are no school fees or associated fees for parents. Schools provide all school supplies. At least 70 percent of students must be girls. At least 70 percent of teachers are local married women with nine or more years of education. The emphasis on married women is part of the efforts to provide a safe and culturally acceptable environment for girls. There is a strong teacher training and monitoring component (with ongoing training and visits by BRAC workers every month). There are high levels of participation by parents and the local community on school governance, curriculum design, and hours (parents must attend meetings every month). Schools operate in one room usually rented for a few hours a day. Students sit on mats and use slates for writing. After “graduation” from BRAC schools children are encouraged to continue their education in the formal schooling system.

Operating level: BRAC is a development nongovernmental organization operating at the school level.

Geographic focus and context: Remote rural areas in Bangladesh. Bangladesh is a very poor country that experiences great challenges in reaching the Millennium Development Goals in education and gender equality (by 1990 female literacy rates were about 22 percent, the enrollment rate was only 60 percent, and the average primary education completion rate was 20 percent). BRAC was founded in 1971 as a hunger relief organization evolving toward a development organization. BRAC’s mission is to build the capacity of the rural poor.

Time period for implementation: 1985–present.

Outcome or impact information, or information from any evaluation: The program was launched in 1985 with 22 experimental schools and it expanded very rapidly. By 1996, BRAC operated in 34,175 schools all over the country. BRAC also partners with other nongovernmental organizations in Bangladesh for domestic project replication reaching about 8,000 more schools. More than 90 percent of BRAC students complete the basic cycle and a large proportion are admitted into Class IV or higher in the formal school system.

Keys to success: Program design is based on extensive research about why the target group never attended school or dropped out of the formal school system, mainly: poverty, gender discrimination, distance from home, curriculum irrelevant to village life, and economy. Targeting was excellent. Teacher selection and training were strong. The program was flexible and inexpensive. There were high levels of parental and community involvement and child partici-

pation and integration into the learning process. Each school ends after the class graduates and does not re-open until there is a sufficient number of new students.

Assessment of quality of information and limitations of the methods and data: High quality reports and rigorous impact evaluations commissioned by program donors. Several methods were used: field visits, case studies, household surveys, and cost studies.

Cost and cost-effectiveness: BRAC unit costs for schooling are equivalent to those incurred by the formal public system. However, BRAC's extra private costs paid by households are significantly lower than the private costs of formal public schooling.

Funding source: UNICEF, the Swedish International Development Agency, Oxfam Netherlands, official development assistance, Kreditanstalt für Wiederaufbau, government of the Netherlands, Directorate-General for Development Cooperation, U.K. Department for International Development, the Aga Khan Foundation, and the Canadian International Development Agency.

Reference materials and source of information for summary: World Bank (2003a); BRAC Education Program website; Craig, Kraft, and Pleiss (1998).

Potential scalability or replication in different contexts: This project has been successfully scaled up and replicated in Bangladesh's rural context and some poor urban areas. Some elements of the project can be applied with success in rural schools in other countries. On the other hand, the school model itself is hard to replicate in different contexts because it is extremely well targeted to the needs of rural households in Bangladesh.

Guatemala New School: Nueva Escuela Unitaria

Initiative: New Unit School (NEU).¹⁰

Specific aims and objectives: NEU is a multigrade schooling program developed for the rural areas of Guatemala. The NEU was based on the Escuela Nueva model in Colombia, which involved children in their own education through a participatory approach. The main objective of the initiative was to increase enrollment and retention in rural areas, especially for girls and ethnic Mayan children. In addition, the NEU aimed at improving educational achievement and school retention. Some of the elements of this initiative are teacher training (including training in Mayan language skills), teacher participation in curriculum design and management (Circuitos de Maestros), education materials production by teachers, and inclusion of private schools.

Operating level: Ministry of Education and local education authorities.

Geographic focus and context: At the end of a cruel civil war the Government of Guatemala started this program in order to improve access, quality, and equity of educational opportunities for indigenous and other rural populations. Rural regions were partly covered by multigrade schools facing many challenges (high rates of dropout and repetition). At the end of the 1980s, only 10 percent of children in rural areas completed primary basic education. Quality was also poor with high rates of teacher absenteeism, repetition, curriculum irrelevance, and memorization as the primary tool for learning.

Time period for implementation: 1989–present.

Outcome or impact information, or information from any evaluation: The program started as a small pilot, but by 1996 there were an estimated 927 schools participating on the NEU with 49,472 students. The project led to significantly higher attendance and school completion rates. NEU schools had more active participation by girls and Mayan students. Teachers received twice the training on how to work with girls and ethnic minorities than did teachers in traditional schools.

Keys to success: Targeting was excellent. Teacher selection and training were strong. The program was flexible and inexpensive. There were high levels of parental and community involvement and child participation and integration into the learning process. Teachers produced excellent low-cost school materials that took into account local needs and preferences. Implementation was decentralized. Student promotion was flexible (students progress through study units at their own pace).

Assessment of quality of information and limitations of the methods and data: High quality reports and rigorous impact evaluations commissioned by program donors.

Cost and cost-effectiveness: No information on total cost or cost-effectiveness was provided in the sources of information used in this summary.

Funding source: Government of Guatemala and the United States Agency for International Development.

Reference materials and source of information for summary: PREAL (2003); Craig, Kraft, and Plessis (1998).

Potential scalability or replication in different contexts: This program was scaled up in Guatemala and replicates the principles of a previous experience on mul-

tigrade schooling in Colombia. Thus, the initiative could cover more schools in Guatemala and could be an interesting model for countries with vast excluded rural populations.

Promising interventions in school effectiveness

Community Ownership for Better Schools, MAYA, India

Initiative: Movement for Alternatives and Youth Awareness (MAYA), Prajayatna Process.

Specific aims and objectives: MAYA's primary approach is to build empowered human institutions of the poor and to enable local democracy. The Prajayatna is a citizen's initiative, facilitated by MAYA, that seeks to bring sustainable educational reform by strengthening institutions of local self-governance and civil society towards community ownership of the education system. Periodic meetings and councils at the school, administration, and state government levels enable the process of continuous education improvement. Prajayatna contains several elements: village-level meetings to diagnose problems in the school and think creatively about solutions that involve the community, accountability mechanisms; institutional capacity building working with elected functionaries of local self-governing bodies; facilitating access and use of information (surveys and databank); connecting all stakeholders and forming partnerships among parents, school administrators, teachers, and government officials.

Operating level: MAYA is a nongovernmental organization operating at the local community level.

Geographic focus and context: MAYA's education reform initiative addresses issues of the quality of 15,000 government schools in six districts of Karnataka (Bangalore Urban, Bangalore Rural, Mysore, Chitradurga, Bellary, and Bijapur) through working with children, parents, school committees, the education bureaucracy in the six districts, and the state bureaucracy. The state of Karnataka registers relatively high levels of enrollment and retention in comparison with other regions in India. Education in Karnataka faces important equity and quality challenges.

Time period for implementation: 1999–present.

Outcome or impact information, or information from any evaluation: More than 1,000 Shikshana Grama Sabhas Councils facilitated across six districts. The consultation process has also produced a primary school databank to inform

reform and policy with information about 12,000 government schools. Schools that participate in the program report infrastructure improvements and new construction undertaken by parents and the school.

Keys to success: The methodology of school governance participation incorporates the culture and characteristics of local communities. Selection and training of facilitators and volunteers were excellent. Facilitators showed strong leadership qualities. Commitment and accountability of the organization and school authorities were high.

Assessment of quality of information and limitations of the methods and data: High quality reports to donors (annual report). The intervention has not been evaluated in terms of net impact on children learning.

Cost and cost-effectiveness: No information on cost effectiveness.

Funding source: State of Karnataka, bilateral agencies, and individual contributions.

Reference materials and source of information for summary: Maya (2002); Banerjee (2000); and July 2003 field visit by the UN Millennium Project Task Force on Education and Gender Equality.

Potential scalability or replication in different contexts: MAYA has been successfully scaled up in the state of Karnataka. The key of MAYA's success is knowledge of the participating communities. The model of community participation is replicable in different contexts only after considerable redesign to take into account the culture and context of each community.

Mathematics and Radio: Interactive Mathematics for Basic Education, Venezuela.

Initiative: Interactive Mathematics.

Specific aims and objectives: Improve the quality of mathematics teaching in the first three grades of basic education. The radio program is designed to combine listening with class activities. Classroom activities following the radio program include reinforcement of the contents of the radio program as an evaluation of the new techniques learned. The program includes materials and training for teachers. A second objective of the program is to increase the motivation for learning mathematics using short stories in which characters need to apply their mathematical techniques. Additional motivational aids include songs, puzzles, and games.

Operating level: The program was developed and implemented at the state level by CENAMEC (a public foundation to improve the teaching and learning of the natural sciences). Geographic focus and context: urban and rural schools in poor neighborhoods. Venezuela registers relatively high levels of enrollment and completion. However, the country's education system suffers severe quality and equity problems.

Time period for implementation: 1991–present.

Outcome or impact information, or information from any evaluation: The program has grown significantly and it operates now in the whole country. Evaluation results indicate that children's ability to learn mathematics is enhanced. The ability of teachers to teach mathematics is significantly improved.

Keys to success: Teacher training was strong. Support materials for teachers and students were excellent. Radio reaches even the most remote areas. Sessions are fun for students. Implementation and administration at the state level (structure at the CENAMEC) were efficient.

Assessment of quality of information and limitations of the methods and data: High quality reports and evaluations. Evaluations included the implementation of standard performance tests in mathematics to children who had participated in the program and to children who did not participate in the program but had similar school preparation.

Cost and cost-effectiveness: Total costs of the program are approximately \$500,000 for one complete series. The cost per student per cycle is \$1.76, signaling high levels of cost-effectiveness.

Funding source: Venezuelan private sector and World Bank.

Reference materials and source of information for summary: Ghetea and Vasquez (1999); PREAL (2000).

Potential scalability or replication in different contexts: This program was successfully scaled up. The program is a replication of a smaller initiative in Nicaragua.

Multiphase Program for Equity in Basic Education, Dominican Republic

The objective of the program is to improve equity by increasing primary education access and achievement in rural areas, increasing primary education access and achievement in excluded urban areas, and improving school management. In order to improve access in rural areas, the project proposes a multigrade

school model that encourages the active participation of students. This project was financed by the Inter-American Development Bank.¹¹

Interesting interventions in school effectiveness

Teacher training

Teacher education and ongoing teacher training programs are key for school effectiveness. The best programs are those that allow continuum learning by teachers, keep teachers directly involved in the design of training programs, and establish mechanisms of support for teachers' long-term professional development (committees, networks, groups within unions). Most of the success stories in this paper have a strong teacher training component. Additional examples of successful teacher training programs are Botswana Primary Education Improvement Project, the Basic Education Teacher Diploma (Namibia), Lesotho's Teacher Support Network, Malawi School Support System, and the Rajasthan Training Program (India). In Guinea the government is implementing a small grants program for teachers that includes grant writing training and other learning opportunities. Traditional and new information technologies can be a great tool for ongoing teacher training. In Brazil, distance education for teachers uses television as an essential tool (TV Escola).¹²

Community participation

Community participation is a key element in many of the projects summarized in this study (Uemura 1999). Additional examples of how community participation and parental involvement can improve the quality of schools are the Basic Education Project (Chad), Education Reform Project (Bolivia), Human Resources Development (Tanzania), and Honduras Basic Education Program. In Ghana, the UNICEF project Childscope seeks to empower parents and teachers to understand the needs of children. Parents and teachers work together in planning and implementation activities to enhance children's learning. The community has helped improve the physical plant of the schools (Agarwal and Hartwell 1998).

Multicultural, multilingual, and bilingual education

Countries with diverse ethnolinguistic groups face additional equity challenges for universal primary education. Successful programs in multicultural and multilingual education go beyond translating contents from the official national textbooks to incorporate knowledge idiosyncratic to ethnolinguistic groups. Mexico has a long tradition of multilingual education, with specific public education programs operating since 1963. Currently, Mexico's Consejo Nacional de Fomento Educativo program is implementing formal and non-formal programs for indigenous groups in their native tongue and Spanish

using high quality bilingual textbooks and such pedagogic materials as cassettes and short stories books (PREAL 2000; De Andraca 2003).

Application of information and communication technologies to education

Information and communication technologies transform distance learning. Radio and television have been used for teacher training and primary and secondary education for decades. Additional examples of the use of radio and television are secondary schooling in Mexico (Telesecundaria) and Brazil (Telecurso). Interactive technologies, such as the Internet and video conferencing, have recently been used with success in both rural and urban settings with Chile's Enlaces program and South Africa's SHOMA program (De Moura Castro, Wolf, and Garcia 1999). However, steep fixed initial costs and infrastructure needs prevent innovations using television and the Internet from being replicated in the poorest regions of the world. However, radio programs are remarkably inexpensive.

Programs to accelerate learning and compensatory programs

These programs design a special curriculum for groups of children who are hard to reach, out of school, or with high repetition rates. The Complementary Basic Education Program in Tanzania (COBET) provides basic education to children who have dropped out of school or have never been enrolled (with a special focus on girls in some provinces).¹³ Complementary Opportunities for Primary Education (COPE) in Uganda was designed to provide an accelerated primary education (equivalent to grade 5 in three years).¹⁴ In São Paulo, Brazil, a promising program offers an accelerated curriculum to children who are two or more years behind their age-appropriate grade. Acceleration classes are offered in the school where the child regularly attends class.¹⁵ In Mexico, a set of compensatory programs have the objective of reverting the effects of grade repetition in rural areas. These programs include the provision of tailored education materials, training of teachers and school managers, infrastructure improvements, and parental involvement (De Andraca 2003).

Focusing on girls

Some countries in Africa and the Middle East are facing significant challenges to increasing education access and quality for girls. The African Girls Education Initiative is a multicountry effort that has produced significant results in this arena.¹⁶ In Namibia, a project in the Kavango region (notable for the low levels of girls' enrollment), helped increase the proportion of girls from 25 percent to 33 percent between 1992 and 2001. Among the best features of the project is the creation of Girls' Clubs, which promote girls participation, confidence, teamwork, and leadership.¹⁷ In Yemen, the Hamlet Girls' Schools Project provides education to out-of-school girls. By 1998, Hamlet Girls'

Schools had 2,045 female students in the Al-Zeidiyah district, 2,560 students in Al Qanawis district, and 2,099 students in Radfan district. The key elements to the project's success are separate schools for girls or separate schedules for girl-only classes, qualified female teachers, convenient school location, and support for female students and incentives for teachers and supervisors (Alajami, Al-Dubaie, and Al-Meikhalafy 1997).

Increasing household demand for basic education

Historically, the most drastic intervention affecting household demand for basic education has been the provision of compulsory and free public primary schooling, embedded in the design and regulation of most education systems in the world. In practice, compulsory primary schooling remains a millennium challenge, mainly because, even with free tuition, there are significant direct and indirect costs of schooling that become unbearable for poor households, such as transportation, uniforms, textbooks, forgone earnings, and forgone household production (Patrinos and Ariasingam 1997). Traditional programs affecting household demand rely mostly on reducing or eliminating school fees and public information campaigns about the benefits of schooling. Traditional approaches have produced considerable advancement, and recent experiences show that these policies are still relevant. However, we emphasize in our synthesis recent innovative approaches to increase schooling demand for both girls and boys among poor households through “negative price” interventions, such as conditional cash support programs, scholarships for girls, and take-home food rations. Child labor programs, even if not directly aiming at expanding formal education, should also be part of an overall strategy to increase household demand for education.

Successful interventions in household demand for basic education

Progres a Oportunidades, Mexico

Initiative: Programa de Educacion, Salud y Alimentacion (PROGRESA). The program was renamed Programa Oportunidades in 2002.

Specific aims and objectives: Increase primary and secondary education enrollment and completion for both boys and girls in poor households. Improve the health and nutrition of participating households (not only the children attending school). Poverty targeting was achieved employing both geographical targeting and household targeting (using household income and a local poverty line). The program provides cash transfers to poor households in the most marginal rural areas (currently under expansion to poor urban areas), conditioned to household members attending school regularly (for children in

grades 3–9), or 85 percent attendance each month, accepting absence for verified health reasons. Grants increase with grade and are higher for girls (from 80 pesos in grade 3 to 250 and 305 pesos in grade 9 for boys and girls respectively). The total (including uniform transfer as part of health component) that can be received by households is capped. Failure to meet conditions leads to loss of benefit, at first temporarily, then permanently. Integrated with a health and nutrition intervention component. Supply side delivered separately and expected to ensure that quality of schooling does not fall.

Operating level: Mostly household demand for schooling, but also has impact on schooling supply and education sector reform. Designed and implemented at the national level by a specific agency (CONPROGRESA) within the Ministry for Social Development.

Geographic focus and context: Mexico. Before the program started, primary enrollment was 93 percent, but dropped to 55 percent in 7th grade in rural poor households. Initially it was implemented as a pilot under President Ernesto Zedillo's presidency in some rural areas; it was then expanded to most poor rural areas, and currently is being expanded to poor urban areas. This project had considerable support from the Zedillo administration as a "poster social program." The program was so successful that it attained sustainability and was adopted and expanded by the Fox administration.

Time period for implementation: Pilot phase started in 1992 and by 1997 the program covered most poor rural areas in the country. Presently, it is under pilot implementation in urban areas.

Outcome or impact information, or information from any evaluation: Progresá had from the beginning a systematic evaluation component through random selection of the order in which communities will start benefiting from the program, providing a control group. It has been one of the most studied and scientifically evaluated education programs in Latin America. The program has produced significant positive net impacts in three areas: primary education enrollment and regular attendance, girls' enrollment and primary school completion, and poverty reduction. The program has not produced significant negative impacts on fertility or school quality. More detailed results from these evaluations are summarized in the following paragraphs from Morley and Coady (2003): By 1999, the program operated in nearly 20,000 localities, in 2,000 municipalities, and 31 states covering 2.6 million families (40 percent of all rural families). In 1999, the average monthly transfer was 238 pesos per month per beneficiary household, equivalent to 19.5 percent of mean value of consumption prior to program. The poverty headcount reduced in participating communities by

about 10 percent, the poverty gap by 30 percent, and the severity of poverty by 45 percent. At the primary level, the program increases enrollment rate (from 93 percent) by 0.74–1.07 and 0.96–1.45 percentage points for boys and girls respectively. The aggregate effect of increased schooling is equivalent to up to 0.66 years of additional schooling by grade 9 (0.72 and 0.64 for girls and boys respectively), a 10 percent increase in schooling for the poor. The internal rate of return for the program is approximately 8 percent per year (based on estimates of future wages). Some evidence of reduction of child labor due to the program and reduction of dropout rate.

Keys to success: Program design and appropriate incentives in place, careful calibration during pilot stage, “poster social program” character that provided sustained political support, major commitment of public funds, good management and implementation from the central agency in charge, and good social marketing. Combination of interventions in three areas (poverty, education, and health) boosted results. Rigorous evaluation was incorporated at the project design stage, generating reliable data and studies. Availability of information about the program and its impact in turn helped maintain high levels of political and economic support.

Assessment of quality of information and limitations of the methods and data: State of the art data collection and reporting have allowed high quality research and evaluation. Availability of randomly selected control and treatment groups.

Cost and cost-effectiveness: In 1999, the annual budget was \$777 million, equivalent to 0.2 percent of GDP and 20 percent of the federal poverty alleviation budget. In 2000, total program budget was 0.2 percent of GDP, or 1.9 percent of total social expenditures. Administrative costs were around 8.9 percent of total program costs over the period 1997–2000. Households incurred extra travel costs and other private costs that added up to 11.3 pesos per 100 pesos received in the year 2000. Empirical evidence suggests that resources allocated to Progresa cash transfers are more efficient than equivalent resources devoted to building schools.

Funding source: Initial phase was funded by the Mexican government only. Currently, the Inter-American Development Bank is co-financing the expansion phase.

Reference materials and source of information for summary: High quality independent academic papers and policy and evaluation reports. Morley and Coady (2003); Skoufias and McClafferty (2001); Coady and Parker (2004); T.P. Schultz (2001); PREAL (2002).

Potential scalability or replication in different contexts: This program is a success story in scalability inside Mexico, across rural areas and now urban areas. However, it would be hard to replicate this experience at the scale and scope that was achieved in Mexico due to its existing institutional capacity in the education sector, consistent political support, and commitment of major resources from the social sector budget.

Food for Education, Bangladesh

Initiative: Food for Education.

Specific aims and objectives: Increase basic education enrollment and completion for boys and girls, poverty alleviation, and food security. Poor households with at least one child ages 6–10 receive monthly in-kind transfer (usually wheat, but sometime rice) conditional on children achieving 85 percent attendance per month in primary school. A two-stage targeting system was adopted: geographic and household characteristics (landless, female-headed households, occupations).

Operating level: Household demand. The program is designed and administered at the national level, but implemented through local agencies. A special agency within the Primary and Mass Education Division of the Education Ministry administers the program. At the local level, the municipality (Thana) education officers are responsible for the implementation of the program. School attendance information is translated into food requirements to be processed by the Ministry of Food. The Ministry of Food manages food distribution using a public food supply depot and private suppliers.

Geographic focus and context: Bangladesh rural areas. Basic education enrollment and completion drops from 76 percent in grade 1 to 20 percent in grade 9 (1997). Significant schooling differentials across income groups. Significant gender schooling differentials (rates for girls about 5 percentage points lower than boys). The program was launched to replace a previous food ration program in rural areas that was very costly and badly targeted.

Time period for implementation: The pilot phase started in 1993. The program is still operating.

Outcome or impact information, or information from any evaluation: The program now covers 2 million rural poor households (of 8 million poor households) or 13 percent of all primary school students. Rigorous evaluations have been conducted given the available data (no control groups). The evaluations report a major impact on enrollment. Enrollment increased by 44 percent for

girls and 28 percent for boys in participating schools compared with an average increase of 2.5 percent in nonparticipating schools. Researchers estimate that the net impact of the program is an increase in enrollment rates that ranges between 9 percentage points and 17 percentage points, which is relatively large. Reported improvements in attendance and reduction of dropout rates. Evidence of lower quality in participating schools (higher student-teacher ratio and worse grades) than in nonparticipating schools, but it cannot be attributed to the program. Evaluations report that the program's targeting should be improved. Only 43 percent of the households are from the poorest 40 percent group. The value of the transfer is equivalent to \$36 per student per year on average, which is a significant value compared to average income per capita in Bangladesh. However, the impact of the program on poverty reduction is not clear, perhaps due to its targeting problems.

Keys to success: The program had the right incentives and excellent subsidy design. In-kind transfers are a viable subsidy option for Bangladesh rural poor settings (nonmonetary economy). There was institutional capacity on food security and public food distribution. Targeting mechanisms at the household level need to be improved and school quality supported.

Assessment of quality of information and limitations of the methods and data: Good data collection by implementing agency and reporting have allowed high quality research and evaluation. However, no treatment and control groups are available in a strict sense. Thus, before program and after program comparisons do not necessarily imply causal relations.

Cost and cost-effectiveness: By the year 2000 the program's budget was \$77 million. Evaluations report that this program is relatively efficient, and most of the budget (59 percent) is used for food purchases. The total cost per student is approximately \$3 per month.

Funding source: Major sources are the government of Bangladesh and the United States Agency for International Development.

Reference materials and source of information for summary: Ministry of Education reports; Morley and Coady (2003); Ahmed and del Ninno (2001); Ravalion and Wodon (1999).

Potential scalability or replication in different contexts: This program is a success story of scale-up to cover vast rural areas of Bangladesh. The success of in-kind food subsidies in this particular context had a lot to do with Bangladesh's idiosyncratic food-security institutions. Similar programs are being implemented in several countries where food security and poverty are impediments to education.¹⁸

Nicaragua, Red de Proteccion Social

Initiative: Red de Proteccion Social.

Specific aims and objectives: Pilot conditional cash-transfer program. Main goal was to develop local capacity at the municipal level to implement education (and other social) programs. Cash transfer is given to households with children ages 7–13 who enroll in grades 1–4, conditioned on 85 percent attendance each month. The program also includes a health-subsidy component.

Operating level: Implemented by the central government within the Social Investment Fund agency.

Geographic focus and context: Nicaragua. Pilot was implemented in two of the poorest states in the country (rural areas). The net enrollment ratio in Nicaragua was 78 percent in 1998. Other education attainment indicators are very low on average and also present severe disparities across income groups. Nicaragua is one of the poorest countries in Latin America; about 48 percent of its population is poor. The Social Investment Fund is a large-scale project financed by the Inter-American Development Bank, which enjoys considerable political support and commitment from the current Nicaraguan administration.

Time period for implementation: 1999–present.

Outcome or impact information, or information from any evaluation: Very good poverty targeting at pilot stage, mostly due to geographical targeting. The pilot covers about 10,000 poor rural households. The total education cash transfer is equivalent to \$133 per household a year. Significant poverty reduction impact, especially for households in extreme poverty. The pilot resulted in large increases in gross enrollment (22 percentage points). Increases in enrollment are similar for boys and girls. Enrollment impact is larger for children in extreme poverty. Promising results in the reduction of child labor.

Keys to success: Good program design, incentives, and targeting. Appropriate funding available.

Assessment of quality of information and limitations of the methods and data: Good data collection by implementing agency and reporting has allowed high quality research and evaluation. Availability of treatment and control groups.

Cost and cost-effectiveness: Project budget was \$10 million (2.5 percent of annual government spending on health and education). Reports consider the project

cost-effective. Cost-effectiveness has improved with time (for 2002 administrative costs were projected to be only 9 percent of total cost).

Funding source: Inter-American Development Bank (90 percent) and the government of Nicaragua.

Reference materials and source of information for summary: Moarley and Coady (2003); Rawlings (2003).

Potential scalability or replication in different contexts: According to the results in the pilot stage, the program could be scaled up to cover other rural areas of Nicaragua and replicated in other very poor countries.

Bolsa Escola, Brazil

Initiative: Bolsa Escola.

Specific aims and objectives: Increase attendance, reduce dropout rates and repetition, and reduce late school entry. Cash transfers to poor households with school age children conditional on 90 percent school attendance. Transfer is given to mother of household conditional on all children ages 6–15 attending school.

Operating level: Bolsa Escola was first implemented by local governments in Campinas (social assistance program) and Brasilia (education program). Other local governments wanted to implement similar programs, and recently, all Bolsa Escola initiatives were consolidated into one federal program. Funds for the program are transferred from Secretary of Education to municipality each month based on school records monitored by municipality. Mothers of eligible children are given a magnetic card issued by Caixa Economica Federal so that they can withdraw funds from branch banks.

Geographic focus and context: Brazil, both rural and urban areas. Nearly 23 percent of households are classified as poor. Enrollment rates are high at 96 percent, nearly 100 percent in urban areas, with little difference between boys and girls. However, late entry and slow progression are prevalent, especially in poor households. Political context: Cardoso administration and local governments with strong political will to have success stories (to obtain control over budgets).

Time period for implementation: First implemented in 1995 by local governments in Campinas and Brasilia. Federal Bolsa Escola Program was created in 2001.

Outcome or impact information, or information from any evaluation: The program pays approximately \$6 per month per child up to a maximum of three

children to families with monthly income per capita of less than half of the minimum wage. Approximately 25,000 families are covered. Expanded to rural areas under the PETI program and Programa de Garantia da Renda Mínima, using different design and targeting than urban Bolsa Escola. PETI covered 400,000 children by end of 2000. Targeting has been a challenge and under the new program, municipalities select beneficiaries based on criteria set by the central government (per capita income of less than half the minimum wage). Dropout rates are much lower among beneficiaries compared to non-beneficiaries (0.4 percent compared with 5.6 percent), a larger proportion enter school at right age, have higher promotion rates (80 percent compared with 72 percent), and have similar learning outcomes. Under PETI, school attendance was 79 percent. Transfer to household was approximately equal to the minimum wage (R\$130 per month). This raises household with average per capita income from R\$44 to R\$72, above poverty line of R\$65.

Keys to success: Decentralized model, good design and incentives, modern methods of administration and provision.

Assessment of quality of information and limitations of the methods and data: Availability of reports and high quality research. Randomized experiments not available, and impact is likely to be overestimated given that beneficiaries were likely to start off in a disadvantaged position in all dimensions.

Cost and cost-effectiveness: In the new program, R\$1.7 billion was allocated in 2001 (\$68 million), financed by national fund for Eradication of Poverty, with an objective of reaching 10.7 million children from 5.8 million families. By December 2001, 8.2 million children were enrolled from 4.8 million families. The Brasília program spent \$43.8 (on 43,000 students in 22,500 families).

New Bolsa Escola allocated R\$1.7 billion (\$68 million) to cover 10.7 million children from 5.8 million families in 2001; equivalent to annual \$6.30 (or R\$15.80) per child or \$11.70 (or R\$23.40) per family.

Funding source: Initially it was supported by UNICEF. Currently it is funded by the government of Brazil.

Reference materials and source of information for summary: Ferreira (2001); Buarque (2000); and Morley and Coady (2003).

Potential scalability or replication in different contexts: Bolsa Escola is a good example of a successful bottom-up intervention, and interesting lessons can be derived from this experience about the challenges of scalability (opposite to the top-down PROGRESA).

Promising interventions in household demand for basic education

PRAF, Household Allowance Program, Honduras

Initiative: Programa de Asignación Familiar (Household Allowance Program).

Specific aims and objectives: Increase human capital accumulation (health and education) at the household level for households in extreme poverty. Increase child school and health center attendance for first, second, and third graders. Reduce dropout rates for children in first, second, and third grade. This program offers allowances conditional on school attendance for the children in the household ages 6–12 and health center attendance by children and pregnant women.

Operating level: Central government with the support of municipalities.

Geographic focus and context: Operating in 70 poor municipalities, mostly in the western part of the country (Copan, Ocotepeque, Santa Barbara, Intibuca, La Paz, and Lempira).

Time period for implementation: This program was preceded by an earlier version (that included a school voucher and a health voucher) that was implemented between 1990 and 1998. Current version of the program has been implemented since 1998.

Outcome or impact information, or information from any evaluation: Preliminary evaluation results show impact on poverty reduction and health utilization. By 1999, the program benefited more than 62,000 children in 953 schools. School allowance is approximately \$5 per month per child, for a maximum of three children per household. Preliminary evaluation results indicate positive impact on school coverage, attendance, and quality.

Keys to success: Combination of interventions (poverty, health, and schooling), right incentives, good poverty targeting, and resource availability.

Assessment of quality of information and limitations of the methods and data: High quality reports (PREAL 2002; IFPRI 2000) Systematic monitoring and evaluation system in progress (by IFPRI) using baseline comparison groups constructed with household survey data. Information based on preliminary evaluation results.

Cost and cost-effectiveness: Total budget is \$50 million.

Funding source: Inter-American Development Bank and the government of Honduras.

Reference materials and source of information for summary: PREAL (2002); IFPRI (2000).

Potential scalability or replication in different contexts: The program is already working at a high scale in Honduras where poverty is widespread in the participant municipalities. However, there is not enough information available to determine whether it could be replicated in different contexts.

Elimination of school fees in Uganda

Initiative: Elimination of school fees.¹⁹

Specific aims and objectives: The elimination of school fees was part of an overall set of reforms in Uganda during the 1990s that had the objective of increasing public spending on primary education, increasing enrollment, improving equity, and improving education quality. The abolition of school fees had the objective of making education more accessible to children in poor households, children in rural areas, and girls.

Operating level: Presidency, Ministry of Education, and Education District Offices. In order to reduce opposition to this measure, the president established direct channels with the district offices to enforce this legislation.

Geographic focus and context: During its independent history Uganda suffered decades of authoritarian regimes and human rights abuses. During the 1990s, the group supporting President Museveni started political reforms that lead to democratic presidential and legislative elections. Part of the political platform of the president was a major education reform. The president abruptly decreed the abolition of school fees, confronting significant opposition by the Ministry of Education, which favored a more gradual approach.

Time period for implementation: 1996–2003.

Outcome or impact information, or information from any evaluation: Enrollment for both boys and girls surged. Enrollment for children in poor households increased significantly. Overcrowding in classrooms implied a short-term trade-off between access and quality.

Keys to success: Strong political commitment. The elimination of fees was part of major reforms in other areas such as education financing, administration,

and overall quality improvement. Teacher training and better teacher salaries were also part of the reforms. This last element may have cushioned opposition to reform among teachers' unions.

Assessment of quality of information and limitations of the methods and data: Reports from the World Bank and the United States Agency for International Development. Lack of systematic impact evaluation.

Cost and cost-effectiveness: Total donor support for Uganda's Education System Reforms (1992–2002) was \$135 million. Primary education share of total education expenditure increased by 60.1 percent between 1994 and 1996. There is no information about cost-effectiveness in the consulted sources.

Funding source: World Bank and the United States Agency for International Development.

Reference materials and source of information for summary: World Bank (2003a); Moulton and others (2001).

Potential scalability or replication in different contexts: Eliminating school fees can have an impact in countries in which fees are steep and public education available in most regions. In Uganda school fees were high enough to prevent groups of children from enrolling. For this policy to have a significant impact it has to be part of a broader education sector reform to guarantee minimum quality and secure school financing and operations in spite of the lack of fees.

School waivers for girls, Malawi

Initiative: School Waivers for Girls.

Specific aims and objectives: Increase girls' primary education enrollment and completion. Complement ongoing efforts to increase girls' enrollment in primary school. The fee waiver program covers nonrepeating girls in grades 2–8.

Operating level: Malawi Institute of Education, Ministry of Education, and local level.

Geographic focus and context: Malawi registered low levels of primary enrollment, especially girls' enrollment. A program to increase girls' enrollment was signed by the government of Malawi with the assistance of USAID in 1991. Among other instruments this program included fee waivers. The fee waivers preceded a general elimination of school fees in 1994. There were other versions of the same program being implemented simultaneously (World Bank

program for grades 1–3 and a separate program by the United Nations Development Programme).

Time period for implementation: 1991–95.

Outcome or impact information, or information from any evaluation: The waivers benefited approximately 500,000 girls each year, and girls' repetition rates declined. However, even larger increases in girls' enrollment were achieved with the universal elimination of school fees.

Keys to success: The waivers were part of an overall effort to improve gender parity in education. Other instruments included developing a gender-sensitive curriculum and a national campaign supporting girls' primary education. Another relevant factor in the success of this experience is that recipient girls had to perform well in schools.

Assessment of quality of information and limitations of the methods and data: USAID report. Lack of systematic impact evaluation.

Cost and cost-effectiveness: No information on cost-effectiveness is available in consulted sources.

Funding source: United States Agency for International Development, World Bank, and United Nations Development Programme.

Reference materials and source of information for summary: Moulton and others (2001).

Potential scalability or replication in different contexts: The program ended in 1995 after the universal elimination of school fees in Malawi. Currently a similar program is under implementation, not without some difficulty, to provide waivers for girls in secondary education. This program is replicable in countries that have sharp gender differentials in primary schooling enrollment and that undergo overall reforms to increase female participation in education.

Interesting interventions in household demand for basic education

Several interventions reviewed for this survey in education sector reform and school effectiveness include a grant or subsidy component for poor families. The Balochistan Education Reform in Pakistan includes an in-kind transfer for female students to address the severe gender inequalities of the region. The transfer program is implemented by the World Food Programme and consists of a 5-liter tin of vegetable oil per month to the family of each female student

who attended school for a minimum of 20 days.²⁰ The NEU program in Guatemala has a subsidy for girls that has increased both girls' enrollment and completion in the rural areas (Eduque a la Nina). Conditional cash transfers are being replicated in Africa through the MISA pilot project.

Some interventions to reduce child labor are based on strong education demand tools. The program Supermonos in Colombia shows promising results. Another interesting child labor program with an education demand component is the FONABE in Costa Rica.²¹ MAYA in India has developed temporary short-term and long-term nonformal education programs for child workers who drop out of school or have never attended school. These programs build a bridge to formal school enrollment after graduation (in 2002, more than 1,240 working children went back to school).

Focusing on students' preparation and health

Initiatives designed to increase students' ability to learn include a variety of early childhood education programs, as well as school feeding (a healthy meal early in the day) and school-based health programs. Some of these interventions are part of school demand programs (Progres's health component, for instance), education reform programs, or programs to increase school effectiveness. These interventions are substantiated on years of solid research about early child development and the impact of health and nutrition on learning. In recent years, development agencies have put special attention to reaching children at the earliest possible stage combining some of these programs with maternal care programs.²²

School feeding is being implemented in more than 100 countries and is reaching large numbers of children.²³ School feeding addresses several Millennium Development Goals, in addition to universal primary education, and it can serve as a platform for community participation as well as other interventions (health programs, gender equity, and school quality programs).

Successful interventions in student's preparation and health

Primary School Deworming Program, Kenya

Initiative: Primary School Deworming Program.

Specific aims and objectives: Treatment of intestinal parasites including hookworm, roundworm, whipworm, and schistosomiasis. These parasites are very prevalent among school children in Kenya's rural areas. The parasites undermine health and productivity (in the case of heavy infections, children are constantly tired due to iron and protein deficiency and may feel abdominal pain). Iron deficiency anemia can also cause cognitive problems. The treatment was a dosis of albendazole every six months to all children in the school.

The program's ultimate objective is to enhance students' performance. The project was implemented in 75 schools.

Operating level: A Dutch nonprofit organization (ICS), in cooperation with the Busia Ministry of Health Office, implemented the program at the local school level.

Geographic focus and context: Rural areas of southern Busia. This area is populated with very poor farming communities that register high rates of intestinal parasites infections.

Time period for implementation: 1998–present.

Outcome or impact information, or information from any evaluation: About 30,000 children ages 6–10 were treated. The program improved the health of children and reduced school absenteeism by one quarter. However, there is no evidence that deworming increased academic test scores. The program also has cumulative positive externalities and reduces worms and absenteeism in schools located near schools participating in the program.

Keys to success: The program maintained careful design and evaluation, simplicity of treatment, and decentralized implementation.

Assessment of quality of information and limitations of the methods and data: High quality systematic impact evaluation study using randomized trials. Evaluation was imbedded in the design of the intervention from the beginning.

Cost and cost-effectiveness: Deworming is considerably more effective to increase school participation than are alternative methods, such as school subsidies in areas where parasites are widely prevalent. The cost per additional year of school participation using de-worming is only \$3.50.

Funding source: International Christelijk Steunfonds Africa (ICS).

Reference materials and source of information for summary: Miguel and Kremer (2003).

Potential scalability or replication in different contexts: This intervention has great potential for scalability and replication in very different contexts due to its simplicity (treat all children with a dose every six months), the absence of significant side effects, and its low cost. Similar interventions are taking place in other countries in Africa with the support of several donors (World Bank, World Food Programme, the Canadian Government, and UNICEF).

Integrated Child Development Project, Bolivia

Initiative: Integrated Child Development Project-Programa Integral de Desarrollo Infantil (PIDI).

Specific aims and objectives: Establishing a national system to deliver comprehensive health, nutrition, and education services to poor children (ages six months to six years). This program helped the Bolivian government improve its institutional capacity to improve delivery mechanisms. The delivery mechanism was nonformal through home visits or at centers and day care facilities.

Operating level: Central government.

Geographic focus and context: Large urban areas in Bolivia.

Time period for implementation: 1994–2000.

Outcome or impact information, or information from any evaluation: Improved physical, intellectual, and social development of more than 100,000 children. The program trained 21,000 caregivers and 10,000 parents.

Keys to success: The program used institutional capacity building, involvement of parents, and careful design and evaluation.

Assessment of quality of information and limitations of the methods and data: High quality report. Net impact on children's performance is not available.

Cost and cost-effectiveness: Total cost was \$140.2 million.

Funding source: Government of Bolivia and World Bank.

Reference materials and source of information for summary: World Bank (2001b).

Potential scalability or replication in different contexts: Successful replication depends on institutional capacity building in the health and education sectors.

Promising interventions in students' preparation and health

School meals, Kenya

Initiative: Subsidized school meals.

Specific aims and objectives: This program was implemented in preschools with the objective of improving nutrition and education achievement of young children. A nutritious breakfast (422 calorie porridge) was cooked using local ingredients (protein rich flour, corn oil, sugar, and water) in the school by community members and served every morning. Parents took turns supervising the preparation and delivery of the meal.

Operating level: The nongovernmental organization ICS implemented the program at the local level.

Geographic focus and context: Rural western Kenya (Busia and Teso Districts). This area has very high levels of poverty and malnutrition, with 39 percent child stunting. This area registers very low levels of enrollment in preschool. The area also experiences significant equity and quality challenges to universal primary education.

Time period for implementation: 2000–02.

Outcome or impact information, or information from any evaluation: The program covered 25 schools and increased participation by 30 percent. Improvements on test scores thanks to the meals were realized only in schools with well-trained teachers. In these schools, test scores improved significantly due to the school meals. Unfortunately, the program also created overcrowding the classrooms of preschools that participated in the program.

Keys to success: Meals were highly nutritious and used local ingredients. The community was involved in the administration, supervision, and preparation of meals. The program had high levels of accountability to the community.

Assessment of quality of information and limitations of the methods and data: High quality evaluation using randomized trials. Evaluation methods were imbedded in the intervention design.

Cost and cost-effectiveness: No information on cost-effectiveness.

Funding source: ICS and households (through increased school fees).

Reference materials and source of information for summary: Vermeersch (2002).

Potential scalability or replication in different contexts: Similar school feeding programs have been scaled up and replicated in a variety of contexts with great success.

Interesting interventions in students' preparation and health

Sesame Street Goes to Egypt

Educational television programs can enhance the readiness of preschool children to learn. In the case of Alam Simsim (the re-creation of “Sesame Street” in Egypt), the program enhances literacy and numeracy skills while promoting gender equality. Gender equality is promoted using positive images of both girls and boys and a leading female character (Khokha). Khokha is a four-year-old girl with a passion for learning. Leading Egyptian educators, linguists, and health specialists participated in the development of the program. The program has had a large impact because 96 percent of households have access to a television in Egypt.

Initial Education Program, Mexico

This program was a nonformal initiative to educate parents, especially mothers, in the use of appropriate childcare practices at home. Parental knowledge about early stimulation was critical to preparing young children to enroll in school on a timely manner (World Bank 2001b).

Integrated Early Childhood Development, Eritrea

This program's objective is to increase access to high quality services in young children's care, health, and cognitive development. Due to recent border conflicts, Eritrea does not have a satisfactory level of public investment in early childhood development. About 38 percent of all children who are younger than three years old are chronically malnourished. This program counts on a high level of commitment by the central government and careful program design. One characteristic feature of the program is the inclusion of care for orphans (World Bank 2001b).

Schools for pregnant women, Bosnia and Herzegovina

Free prenatal classes covering nutrition for a healthy pregnancy, preparation for labor, breastfeeding, infant care, and sexually transmitted diseases. Currently the program reaches 1,070 pregnant women.²⁴

Conclusions

This paper reports as a success the most salient characteristics of an overall intervention for organization purposes. In fact, many successful interventions used integrated approaches combining education reform elements with school effectiveness (teacher training in particular or community participation) or household demand elements (BRAC, for example). Early childhood interventions and health interventions also included household demand elements and school effectiveness elements and vice-versa (PROGRESA, for example). The

use of integrated approaches was observed in both large-scale interventions and small-scale local interventions.

One of the most important limitations of this study is the lack of systematic evaluations and information on cost effectiveness of programs. However, some specific policy lessons can be extracted from the cases examined on each intervention type.

Education sector reform

Two successful but opposite approaches coexist. On the one hand, some countries have adopted system-wide top-down reforms that integrate management improvements, decentralization, and finance reform. This approach has been particularly successful in the cases of countries undergoing political transformations (Uganda, for example) that were able to count on a strong political commitment by the president or the minister of education. An appropriate communications strategy, the involvement of different groups as reform agents, and decisive legislative change (when required) are also keys of education reform success. On the other hand, some successful bottom-up education reforms have occurred by increasing the flexibility of the overall system to incorporate small- or medium-scale local innovations that have high potential for replication and scalability (India Districts Reforms and Balochistan Province Reforms).

School effectiveness

Increasing community participation, especially direct parental involvement in school governance, leads to great results. Several effective teacher-training models can be successful, depending on the context. However, high-impact training programs were a long-term ongoing process and offered teachers a support network. New technologies can be effectively used to enhance school effectiveness or to provide training to teachers.

Household demand for basic education

These interventions tend to have a very significant impact and be very cost effective. Effective targeting is the most important key to success in this type of intervention. Another important policy lesson from these experiences is their efficient and accountable management. Governments implementing these transfers successfully counted on pre-existing institutional capacity to reach remote areas.

Health and student preparation

These interventions can have a high impact on student performance. Successful implementation of health and nutrition programs in schools depends on effective diagnosis, simplicity of treatments, and effective targeting. Successful implementation of early childhood development programs depends on

the institutional capacity of the health and education system and the provision of maternal health.

Each policy intervention type has its role in universal primary education, yet most resources from the donor community have been traditionally devoted to financing education sector reforms. Should more resources flow toward specific student preparation, school effectiveness, and household demand programs? The latest trends show an increase in funding of conditional cash transfer programs (or take-home food ration programs), early childhood development programs, and school effectiveness programs (with more emphasis on community participation).

The replication of these successful programs poses new education system management challenges. Some cash or food transfer programs bypass the structure of education ministries and are implemented by parallel administrative structures or traditional agriculture or food ministries. In other countries, the Ministry of Education, as the main implementing agency, has carried out school feeding and transfer programs with great success. Specific school effectiveness interventions have implied innovations in the governance of education institutions (teacher unions and school governance bodies for example).

In summary, the UN Millennium Project Task Force on Education and Gender Equality should consider in its recommendations not only the nature of successful education interventions but also the challenges that these innovative policies create for the allocation of donor's resources and education systems in developing countries.

Data issues

This appendix contains excerpts from a paper on data issues prepared for the task force by the United Nations Educational, Scientific and Cultural Organization Institute for Statistics.

Enrollment data

The net enrollment ratio is an overall measure of whether children of school age are actually enrolled in school. It is calculated as the ratio of enrolled children of official school age to the number of children of the same age in the population. The net enrollment ratio provides the best picture of whether children of the appropriate age group are enrolled in the appropriate level of schooling.

The net enrollment ratio can be calculated for two-thirds of countries in the world for the 2001/02 school year. The calculation requires data in three dimensions: year of age multiplied by school grade multiplied by gender. It also requires population data that are disaggregated by single year of age. Some developing countries still do not have population data of adequate quality. In some developing countries, the age of children at school is rounded up or down to meet the official intake age. Supplementary data or coarser enrollment and population data can in some circumstances be used to create estimates.

In some developing countries the number of overage or underage children in any grade can be significant.¹ However those children at primary school who are older or younger than the official school age are not included in net enrollment ratio.

Net enrollment ratio measures the effectiveness of a relatively efficient education system, but it does not measure the degree to which an education system includes a backlog of older children who either did not attend school at the official age or are older than the normal primary age range because they have

had to repeat several years of school. The number of such overage children is captured using the gross enrollment ratio.

The gross enrollment ratio is the ratio of total enrollment, regardless of age, to the population of the age group that officially corresponds to a given level of education. It measures the total volume of education provided by a system.

Gross enrollment ratios of above 100 percent are common and can indicate that children outside of the official age ranges are attending school. It is not possible to make evaluative judgments about the desirability of such gross enrollment ratios without an understanding of the education system in which they occur. Are the ratios high because children are allowed to enter school early, because children who missed out in the past on education are being encouraged to catch up, or because children who are not achieving an appropriate level of education to move ahead are repeating school years?

Gender parity

The existing gender parity indicator for measurement at the global level is the absolute ratio of girls to boys. The United Nations Educational, Scientific and Cultural Organization Institute for Statistics (UIS) normally uses the ratio of girls' enrollment ratio to boys' enrollment, which takes into account the size of population by gender. A gender parity ratio using net enrollment ratio has the advantage of being consistent with the Millennium Development Indicator 6, for enrollment. Basing gender parity on absolute enrollment figures gives a better sense of the overall change in enrollment, but basing it on enrollment ratios weights the indicator according to the proportion of boys and girls in the school age population. Disaggregated data to calculate primary education enrollment by gender are available for almost all countries. Gender-disaggregated data on secondary education is less readily available.

Measuring completion

There are many different candidates for indicators of school completion: survival to grade 5, progression, graduation, and attainment of skills and knowledge.

For UIS, completion measures aim to consider the share of children who enter education together with the number who move through the school system to graduate. In other words, the completers are measured as a share of the sum of those who complete, those who are of the appropriate age but do not complete in the appropriate year, and those who drop out permanently or never went to school. Completion can be a powerful measure of the degree to which, for any theoretical year of graduation, the appropriate potential graduation cohort has been to school and moved through to the final year (unless the country has automatic promotion, when all students either move forward year by year no matter what their abilities or drop out of school completely.)

Different methods are in use in different regions. Currently there is no cross-national measure of primary school completion that is accepted by countries and that can be measured in a harmonized way across a large number of countries. Different international agencies also employ different methods. Among these are the survival rate to grade 5, primary completion rate, and the International Standard Classification of Education Level.

The survival rate to grade 5 measures the share of any school cohort that progresses regularly through the school from grades 1 to 5. To do this it uses the reconstructed cohort method, which uses two consecutive years of age multiplied by grade data and assumes that dropouts do not return to school; that promotion, repetition, and dropout rates remain constant; and that the same rates apply to all pupils in a grade, including repeaters. These assumptions do not necessarily hold for all countries and levels of education. Nevertheless, short of longitudinal tracking of all students, it is a good compromise for measuring how students move through a national education system. Survival rates provide information only on those who enroll; it does not reflect the share of children who do not have access. Survival rates are currently available for only about 40 percent of countries.

The primary completion rate measures the proportion of all children of official graduation age who complete primary school in a given year. It is the total number of students successfully completing (or graduating from) the last year of primary school in a given year (including overage children who either started late or repeated divided by the total number of children of official graduation age in the population. Due to the lack of available data on the number of children successfully achieving the end of primary school, the World Bank has sometimes used enrollment in the last year of primary school as a proxy. The primary completion rate captures the share of children who ever complete the cycle. It is not a measure of on-time completion.

A key criticism of this indicator is its lack of international comparability. Completing primary school means having 3 years of education in one country and 10 years in another. In most countries primary education lasts five or six years (about 45 percent of countries have a six-year primary education cycle; 13 percent have a five-year cycle). In 25 percent of countries, the primary cycle is longer; in 20 percent, it is shorter. The primary completion rate does not incorporate that information.

UNESCO's International Standard Classification of Education (ISCED) addresses this shortcoming. ISCED level 1 specifies that the primary cycle lasts six years. This is meant to correspond to "the beginning of systematic apprenticeship of reading, writing, and mathematics; the start of compulsory education; primary education; first stage of basic education." By fixing a harmonized categorization of six years to the primary cycle, ISCED increased the comparability of educational outcomes based on the basic skills that children learn during that period. ISCED is now the most important transformation

applied to data by national statisticians, with guidance from UIS.² UIS and the World Bank have agreed that the UIS will concentrate on ISCED compatible data, while the Bank will collect data to national standards. The two institutions will share data in a common database hosted by UIS.

Relationships among indicators

Comparison of different indicators across countries provides important international benchmarks. Much more information for policy planning can be gleaned by looking at these various indicators in relation to one another.

Completion rates need to be combined with data on enrollment and survival in order to provide a fuller picture of an educational system. Low completion rates may be due to problems in entering school or in progression. High survival rates may suggest a strong educational system, belied by evidence of very low enrollment. With respect to gender disparities, completion rates may underemphasize girls' difficulties in school by countering poor access with girls' greater staying power once they have entered school. In some countries, for example in the Caribbean, girls' gross enrollment ratios may be somewhat lower than those of boys, but their completion rates may be higher. Elsewhere, as in several West African countries, girls' enrollment rates may show only a slight disparity with boys' rates, but girls' completion rates are significantly lower (Bruns, Mingat, and Rakotomalala 2003).

Net and gross enrollment ratios can also be consistent with a number of different schooling profiles. In the late 1980s, for example, both Brazil and Indonesia had nearly universal access, with close to 100 percent of children starting grade 1. However, 90 percent of students completed grade 5 in Indonesia, compared with 60 percent in Brazil. Net enrollment ratios, gross enrollment ratios, and primary completion rates need not vary in parallel (table A4.1).

Table A4.1
Net enrollment ratios, gross enrollment ratios, and primary completion rates do not necessarily vary in parallel

Country	Gross enrollment ratio (%)	Net enrollment ratio (%)	Primary completion rate (%)
El Salvador	111	81	80
Mongolia	92	81	66
Togo	115	81	68

Source: Bruns, Mingat, and Rakotomalala 2003.

Major initiatives that promote the Millennium Development Goals on education and gender equality

Table A5.1
Declarations affirming universal education and gender equality

1948	Universal Declaration of Human Rights
1979	Convention on the Elimination of All Forms of Discrimination against Women
1989	Convention on the Rights of the Child
1990	World Conference on Education for All (Jomtien, Thailand)
1990	World Summit for Children and “World Declaration on Survival, Protection and Development of Children”
2000	Dakar Framework for Action
2000	Millennium Development Goals
2002	World Fit for Children (at special session for children at UN headquarters in New York)

Table A5.2
Civil society initiatives

Description and mission	Focus and goals
Advocacy	
Basic Education Coalition	
<p>Group of 19 development organizations that advocates for increased priority of basic education in U.S. foreign policy and greater support by G8 nations of quality education for all children in the developing world.</p> <p>Main funding: William and Flora Hewlett Foundation and member organizations.</p>	<ul style="list-style-type: none"> • Increase the U.S. government's role in ensuring achievement of the Education for All goals, including devoting more financial and technical resources. • Conduct public education activities with the U.S. Congress, the media, nongovernmental organizations, multilateral development banks, and grassroots organizations to broaden awareness of the issue among key audiences. • Promote understanding of and raise support for education's fundamental role in economic development, democracy, health, and conflict resolution, among other issues.
Global Campaign for Education	
<p>Global alliance of 400 teacher unions and development organizations in 180 countries that mobilize public opinion and engage teachers and students to urge the donor community and governments to take immediate action to implement Education for All.</p>	<ul style="list-style-type: none"> • Abolish primary school fees in developing countries and increase the share of government spending on education. • Increase debt relief and aid from donor countries. • Increase participation and accountability in education decisionmaking and spending. • Pressure donor governments and international organizations to finance credible country plans to achieve Education for All.
Oxfam Millennium Development Goal Campaign	
<p>A campaign by Oxfam to hold governments accountable for their commitment to reach the Millennium Development Goals and to ensure that governments take action now to make their promises a reality.</p>	<ul style="list-style-type: none"> • Drop unpayable debt. • Follow Britain's lead to set a timetable to achieve 0.7 percent of GDP spent on aid. • Change trade rules so that they work for the poorest, especially rules that allow agricultural export dumping. • Convince Britain to pledge more funds to the Education for All Fast Track Initiative. • Eliminate poverty and reach the Millennium Goals with plans that are developed and implemented in a way that is democratic, transparent, and accountable to citizens.
Research-focused	
Universal Basic and Secondary Education Project	
<p>Explores the rationale, means, and consequences of achieving universal and quality basic and secondary education through high quality research and plan of implementation to achieve universal basic and secondary education.</p> <p>Proposed timeline: 2001–06.</p> <p>Main funding: William and Flora Hewlett Foundation, American Academy of Arts and Sciences, the Golden Family Foundation, John Reed, the Sergei S. Zlinkoff Fund, and Paul Zuckerman.</p>	<ul style="list-style-type: none"> • Focus on basic facts, including the nature and quality of education data. • Examine the intellectual and programmatic history of efforts to achieve universal education to determine why past initiatives have failed. • Explore the consequences of universal education. • Examine the goals of primary and secondary education in different settings to determine whether universal standards exist and ways to monitor progress. • Observe the politics of education reform and main obstacles to progress. • Examine the means of delivery and implementation of universal education. • Find ways to control costs and finance of universal quality basic and secondary education. • Find cross-linkages with health.

Table A5.2
Civil society
initiatives (continued)

Description and mission	Focus and goals
Research-focused	
The Partnership for Educational Revitalization in the Americas	
<p>Established in 1995 by the Inter-American Dialogue in Washington and the Corporation for Development Research in Chile. Seeks to improve the quality and equity of education by helping public and private organizations throughout the Western hemisphere to promote informed debate on education policy, identify and disseminate best practices, and monitor progress toward improvement. Encourages business and civil society to work with governments in common efforts to improve education, and strengthens their capacity to do so.</p> <p>Main funding: United States Agency for International Development, Inter-American Development Bank, Avina Foundation, Tinker Foundation, World Bank, Global Development Network.</p>	<ul style="list-style-type: none"> • Compile education report cards that establish benchmarks and monitor progress in the quantity, quality, and equity of education. • Develop partnerships with national centers to promote informed debate on education policy, identify and disseminate best practices, and monitor progress toward improvement. • Assemble education task forces (of leaders from business, politics, government, and media) charged with raising the profile of education reform, legitimating new ideas, and supporting reform leaders. • Organizing conferences and seminars that bring leading figures in education policy to share insights and recommendations with Latin American audiences. • Create publications that bring carefully selected policy analysis and best practices to the attention of policymakers and opinion leaders. • Use regional working groups to build cross-national networks of specialists working to develop recommendations on key policy issues. • Offer a web page that makes the organization's documents instantly available for downloading and provides links to a broad set of sites of interest to education reformers. • Conduct a regionwide research competition targeting policy issues and building national research capacity. • Enabling community leaders and teachers to visit educational innovations abroad through study tours.
Regional initiatives	
Forum of African American Educationalists	
<p>A pan-African nongovernmental organization focused on improving participation of girls and women in education. Based in Nairobi, Kenya. Has national chapters in 32 countries in Sub-Saharan Africa. Membership includes female ministers and deputy ministers of education, female vice chancellors and deputy vice chancellors, and prominent women educationalists, education practitioners, researchers, and gender experts. The national chapters work on identifying priority action areas and implementing possible solutions.</p>	<ul style="list-style-type: none"> • Influence policy formulation, planning, and implementation in favor of increasing access and improving retention and performance of girls. • Building public awareness and consensus on the social and economic advantages of girls' education through advocacy. • Demonstrating, through interventions on the ground, how to achieve increased access, improved retention, and better performance of girls. • Influencing replication and mainstreaming of best practices.
Latin America Basic Education Initiative	
<p>An outgrowth of the 2001 Latin American Basic Education Summit. A unique partnership program between governments, the private sector (business leaders), and civil society in Latin America that addresses basic high quality education needs in the region.</p>	<ul style="list-style-type: none"> • Increase awareness of the importance of businesses involvement in education reform efforts. • Provide education leadership training and support. • Identify, share, and replicate best practices from the region and beyond that are making a difference. • Build political commitment for education reform in teacher training. • Integrate modern technology and learning achievement. • Improve teacher training and skill development, academic standards, and accountability.

Table A5.2
Civil society
initiatives (continued)

Description and mission	Focus and goals
Regional initiatives	
Africa Network Campaign on Education for All	
A regional network of civil society organizations and national coalitions in 23 African countries working at the grassroots level to promote and advocate access to free quality education for all. Emphasis is on coordination and advocacy, not implementation.	<ul style="list-style-type: none"> Utilize subregional networks to facilitate information sharing on Education for All to stimulate and assist the establishment of national nongovernmental organization coalitions and to mobilize international partners, including UNESCO, to reinforce the capacities of civil society in Education for All. Use Education for All thematic working groups to implement education projects at national and local levels, with each subregion coordinated by an elected moderator.
Meena Communications Initiative	
Conceived in the early 1990s with the help and guidance of Hanna-Barbera Cartoons. A media campaign comprising a 14-part animated series depicting the life of a South Asian girl and her struggles. Implemented by the United Nations Children's Fund and funded by the Norwegian government as a mass communication project aimed at changing perceptions and behavior that hamper the survival, protection, and development of girls in South Asia.	<ul style="list-style-type: none"> Change social attitudes toward education of girls in South Asia. Create demand in communities to address gender equality in education.
UN African Girls' Education Initiative	
Implemented by the United Nations Children's Fund and funded mainly by the Norwegian government. Works in 34 African countries to promote the goals of gender parity and improving quality of education.	<ul style="list-style-type: none"> Facilitate cooperation between donors and governments. Develop country policies on girls' education. Systematically review programs to identify what works to ensure girls enroll in and stay in school.
Major bilateral initiatives	
Canadian International Development Agency	
Calls for funding for basic education increases from \$41 million in 1999/00 to \$164 million in 2004/05, a total five-year investment of \$555 million. Has a broad definition of basic education that is need- and rights-based and includes life skills and basic adult education.	<ul style="list-style-type: none"> Improve quality and access to quality education. Improve and integrate strategies for gender equality. Strengthen HIV/AIDS programs. Support good educational governance and management and strengthen civil society. Promote use of information and communication technologies. Build donor coherence and coordination. Monitor progress using available standards and indicators. Ensure access to free and compulsory primary education by 2015.

Table A5.2 Civil society initiatives (continued)	Description and mission	Focus and goals
	Major bilateral initiatives	
	United States Agency for International Development	<ul style="list-style-type: none"> • Mobilize leadership to promote girls' education and broaden and support local community initiatives to overcome barriers to girls' education. • Improve knowledge of barriers to girls' education to create better participation strategies. • Improve access to quality, management, and effectiveness of education systems. • Support education policy dialogue and reform. • Conduct education surveys linked to Demographic and Health Surveys. • Build country capacity to collect, analyze, and use education data. • Provide short- and long-term technical assistance and capacity building to education ministries and local schools. • Assist in strengthening policy reform process, increase participation of girls and enhance use of technology.
	U.K. Department for International Development	<ul style="list-style-type: none"> • Adopt strong political commitment and provide free primary education and more resources. • Take action on HIV/AIDS. • Harness technology. • Improve quality of education. • Implement sectorwide, integrated approaches to education. • Develop specific priorities for the international community. • Increase resources and dispense them more effectively. • Coordinate efforts among donors. • Promote information and knowledge sharing. • Support efforts to strengthen existing data systems to monitor progress. • Ensure that by 2004, 75 percent of bilateral commitments support multidonor programs and implement government-agreed sector strategies. • Improve gender equality in education especially primary education from base data of 86 percent. • Adopt and implement education sector strategies that explicitly address equitable access for boys and girls by 2004.

Table A5.2
Civil society
initiatives (continued)

Description and mission	Focus and goals
UN-led global initiatives	
UN Girls' Education Initiative	
<p>Launched by the UN Secretary-General in April 2000 at the World Education Forum in Dakar as an integral part of the Education for All movement. A 10-year interagency global initiative, led by the United Nations Children's Fund, which now embraces 13 core partner entities in an informal network. Recognized at the international level as an Education for All flagship for girls' education, but is relatively unknown at country and regional levels.</p>	<ul style="list-style-type: none"> • Build political and resource commitments at the highest levels. • End gender gap in 52 countries with gender gap of more than 5 percent at primary level. • End gender bias and discrimination within education systems. • Assist girls' education in crisis, conflict, and post-conflict situations. • End ingrained gender bias that limits demand for girls' education. • Build on existing strategies and mechanisms to develop country-level plans of action, such as Education for All plans, Poverty Reduction Strategy Papers, sectorwide approaches, national assessment teams, and CCA/UNDAF. • Enhance collaboration between partners within the UN system. • Develop a framework that builds on the strategic strengths of each partner and converts it into an organized collaborative effort.
25 x 2005—Accelerating Progress in Girls' Education	
<p>Uses a rights-based approach to supplement efforts already in place for maximizing the number of girls in school by 2005 by focusing on high-risk countries with low girls' enrollment rates and high gender inequality and by partnering with existing initiatives, such as the Fast Track Initiative, the UN Girls' Education Initiative, and the African Girls' Education Initiative.</p> <p>Member countries: Afghanistan, Bangladesh, Benin, Bhutan, Bolivia, Burkina Faso, Central African Republic, Chad, Democratic Republic of Congo, Djibouti, Eritrea, Ethiopia, Guinea, India, Malawi, Mali, Nepal, Nigeria, Pakistan, Papua New Guinea, Sudan, Tanzania, Turkey, Yemen, and Zambia.</p>	<ul style="list-style-type: none"> • Reduce the number of out-of-school girls by at least 30 percent by 2005. • Improve retention and completion rates for girls. • Improve performance by girls in learning achievement. • Demonstrate robust and sustainable achievements in the education systems (as measured by effective evaluations). • Offer analytical and data input into the Education for All Monitoring Report. • Conduct other analytical work, such as country case studies on the impact of interventions, synthesis, and review of studies on girls' education since Jomtien in 1990, and technical papers on experience of the acceleration strategy. • Compile and produce "greatest hits" advocacy messages on girls' education over the last 20 years. • Collect in words and pictures messages and remarks by girls who have been helped through the acceleration strategy.
Education for All	
<p>Global commitment endorsed by the international community at the World Education Conference in Jomtien, Thailand, in 1990, in recognition of the importance of achieving universal education in this millennium. Reaffirmed at the World Education Conference at Dakar in 2000, with the adoption of the Dakar Framework of Action, which specified six particular education goals to be achieved. Produces a Global Monitoring Report to ensure accountability and implementation of pledges made in Dakar, and to measure progress toward the six Education for All goals outlined in the Framework of Action.</p>	<ul style="list-style-type: none"> • Set up an International Task Force on Education for All to develop a comprehensive strategy to operationalize the Dakar Framework of Action by March 2002. • Include civil society participation in the context of poverty reduction and entire education sector. • Actively advocate at the national and international levels. • Finance primary education first, then other Dakar goals. • Reinforce national systems, improve indicators, and publish Education for All Monitoring Report. • Strengthen inclusive national Education for All forums as place of policy formulation. • Focus work of Education for All working group and high-level group at the international level.

Table A5.2 Civil society initiatives (continued)	Description and mission	Focus and goals
	UN-led global initiatives	
	Education for All Fast Track Initiative	
	Initiated as a response to a call in November 2001 by the Development Committee to prepare an action plan to accelerate progress to reach the Millennium Development Goal of universal education. Seeks to implement a focused, coordinated, and intense effort in a limited number of countries with sound education policies to achieve universal education, as measured by universal primary completion.	<ul style="list-style-type: none"> • Accelerate progress through strengthening national education policies, improved capacity, political commitment, and incremental and coordinated financing resources as a result of partnerships between donors and developing countries. • Mobilize resources toward the achievement of the goal. • Yield results and success stories that can be replicated, as well as contribute to the knowledge of what works. • Select countries that had full Poverty Reduction Strategy Papers by August 2002 and had sectorwide plans for education agreed with donors.
	Member countries: Albania, Bangladesh, Bolivia, Burkina Faso, Democratic Republic of Congo, Ethiopia, Gambia, Ghana, Guinea, Guyana, Honduras, India, Mauritania, Mozambique, Nicaragua, Niger, Nigeria, Pakistan, Tanzania, Uganda, Viet Nam, Yemen, and Zambia.	
	Multilateral organizations	
	World Bank	
	Recognizes education as a key institution activity and as a critical sector. Lead agency for implementation of EFA Fast Track Initiative. Important components of work on education are research, knowledge generation, and dissemination. Committed \$10 billion to education projects at end-March 2003—half for primary education.	<ul style="list-style-type: none"> • Assist poor countries in fighting poverty and improving living standards. • Focus on policy reform, quality, and learning achievement rather than infrastructure. • Support country ownership and partnerships with various in-country players. • Harmonize education policies with other donors and sector plans.
	Inter-American Development Bank	
	Focuses mainly on education reform to increase effectiveness, coverage, and equity. Supports the Millennium Development Goals and their integration into its strategy and goals. Disbursed \$115 million for education in 2002.	<ul style="list-style-type: none"> • Support human resources for development. • Facilitate national efforts for introducing conditions of fairness in access to education opportunities for the entire population. • Invest efficiently in education to stimulate and support national efforts for rational planning of education systems and the essential reforms in content, teaching methods, and organization and administration of programs, institutions, and systems in order to achieve more positive results with the financial possibilities of countries.
	Asian Development Bank	
	Has shifted policy since 1991 to focus more on basic education—specifically on teacher training, curriculum development, and education planning. Approved its education policy in August 2002 to complement the objectives of the Millennium Development Goals. Allocated \$1.58 billion to basic education in 1991–2001 (41 percent of total education funding). Supports for Education for All.	<ul style="list-style-type: none"> • Enhance equity and access. • Improving quality. • Strengthen management. • Mobilize resources. • Initiate partnerships. • Apply of new technologies. • Promote education policies that lead to poverty reduction. • Incorporate gender within education strategies.
	African Development Bank	
	Has adopted a holistic approach affirming that quality basic education for all, including literacy for youth and adults, is the most important task in education in Africa in the common decade.	<ul style="list-style-type: none"> • Improve equity and access. • Improve quality of education. • Improve management and decentralization. • Improve financing mechanisms. • Adopt a sectorwide approach and a participatory approach. • Improve donor coordination.

Need for postprimary education

Given its current quality and orientation, schooling does not produce enduring benefits until a minimum threshold is reached, particularly for women. The location of that threshold varies by context—not only degree of gender stratification, but also such factors as level of development and rural-urban setting. In general, more education will be required to secure returns in settings that are more gender stratified or more impoverished. The threshold also varies depending on the outcome being measured: literacy, labor market returns, fertility, violence against women, and HIV/AIDS risk.

Literacy

A growing body of research suggests that completing at least five to six years of schooling is a critical threshold for sustainable mastery of basic competencies. Permanent literacy and basic numeracy cannot generally be achieved on any less. The United Nations Educational, Scientific and Cultural Organization Institute for Statistics finds that 10 percent of children are literate after three years of education, 70 percent reach literacy after six years, and 100 percent attain literacy with 10 years of basic education (Ellis 2003). Longer matriculation is also associated with greater retention of literacy skills. Importantly, literacy skills also are retained only if individuals are in an environment in which these skills are required and reinforced over a lifetime.

Labor market returns

Psacharopoulos and Patrinos (2002) review the latest estimates and patterns in the literature on returns to investment in education. They report that, overall, women receive higher returns to their schooling investments (10 percent) than men receive (9 percent). Returns vary, however, by level of schooling. The returns to primary education are much higher for men (20 percent) than for

women (13 percent). Women, on the other hand, experience higher returns to secondary education (18 percent) than do men (14 percent).

Fertility and mortality

Female secondary education is a critical component of lowering fertility and mortality. Subbarao and Rainey (1995) conducted a cross-country study examining fertility and secondary school attainment among women in 65 low- and middle-income countries in 1985, collectively including 93 percent of the population of the developing world. In countries where few women had a secondary education, family size averaged more than five children, of whom one to two died in infancy. But in countries where half the girls were educated at the secondary level, the fertility rate fell to just over three children and child deaths were rare. Subbarao and Rainey calculated that in these 65 countries, doubling the proportion of girls educated at the secondary level from 19 percent to 38 percent in 1985, holding constant all other variables (including access to family planning and health care), would have cut the fertility rate from 5.3 births per woman to 3.9 and the infant mortality rate from 81 deaths per 100,000 live births to 38. In percentage terms, it would have reduced births by 29 percent and infant deaths by 64 percent compared with the actual in 1985.

Other multicountry studies confirm that girls who drop out of school and marry in their early teens typically begin childbearing before their bodies are mature and continue with closely spaced births. The result is high mortality, among children as well as mothers. Evidence also consistently shows that women with no or less than primary schooling tend to have earlier ages at marriage or first birth and higher subsequent fertility than those who have completed primary schooling (Herz and Measham 1987; Ainsworth, Beegle, and Nyamete 1996).

Another study summarizing sample surveys across the developing world compares female education and fertility by region. The higher the level of female education, the lower desired family size and the greater the success in achieving desired family size. Further, each additional year of a mother's schooling cuts the expected infant mortality rate by 5–10 percent (T.P. Schultz 1993).

Physical integrity

Female education can play a critical part in reducing violence against girls and women and enhancing their control over their own bodies. As the evidence on female genital mutilation makes clear, secondary education may once again provide an important threshold.

Profiles of nine African countries found that female genital mutilation was more prevalent among uneducated women. Women with primary or no education are more likely to have been cut than those who have received secondary level instruction. In the Central African Republic, for example, 48 percent of

women with no education and 45 percent with primary education have been cut, while only 23 percent of women with secondary education have been subjected to the practice (Population Reference Bureau 2001). Another study by the World Health Organization (WHO 1998) reports that in Côte d'Ivoire, 55 percent of uneducated women had been cut, compared with 24 percent of women with a primary or higher level of education.

Women's education also affects their attitude toward the genital mutilation of their daughters. A study in Kenya found that women who had some secondary education were four times more likely to oppose female genital mutilation both in general and for their daughters and granddaughters as women who had never completed primary school (Egypt, Ministry of Health and Population 1995). In Burkina Faso a World Health Organization (WHO 1998) study found that educated women were 40 percent less likely to have their daughters subjected to female genital mutilation. The study found that while 78 percent of girls whose mothers had not graduated from primary school had been cut, only 48 percent of girls whose mothers had received some secondary education allowed their daughters to be cut.

Notes

Executive summary

1. All dollar amounts are US dollars unless otherwise indicated.

Chapter 2

1. This is the fundamental argument in Berhman and Birdsall (1983), who show that private returns to the quality of education are higher than private returns to the quantity of education.
2. This study included only 3 developing countries in a sample of 39 countries. Expenditures on schooling were not correlated with student performance on the tests.
3. In fact, market distortions in developing countries typically keep the marginal private return, if not the average private return, high compared with that in developed countries. In Egypt, for example, the government policy of guaranteeing public sector jobs to all secondary school and university graduates ensured high marginal private returns, especially to higher education. But these rates were independent on the quality of education, the productivity of the graduates (a function of human capital, motivation, and complementary inputs) and whether there was real demand for their skills in the public sector. The policy probably reduced the demand for and pressure on the educational system to transmit learning and skills as opposed to simply certifying graduates (Birdsall, London, and O'Connell 1999).
4. For more on poverty traps, see UN Millennium Project 2005a.

Chapter 4

1. Primary completion is the total number of students successfully completing the last year of primary school divided by the total number of children of “graduating age” in a given year. In some cases, completion is measured as true “survival” to the end of a five-to six-year school cycle; in other cases, completion is measured using a proxy (enrollment in the final grade of the cycle). Primary completion rates used in this section are those provided by the World Bank.

Chapter 5

1. Large portions of chapters 5–7 are excerpted from Lewis (2004).
2. Enrollment is a poor indicator of learning; it is used here only because better indicators, such as the proportion of children completing primary school and measures of learning achievement, are unavailable for many countries.
3. Low-income countries are defined here as countries eligible for International Development Association (IDA) lending from the World Bank. Includes IDA and blend countries.
4. In Uganda the government measured its performance in getting resources transferred equitably to schools, found it lacking, and took corrective action.
5. The CIET (1999) Social Audits provide additional quantitative measures by country.
6. It should be noted that not all countries consider education highly corrupt. In Latvia and Romania, for example, education was ranked as one of the least corrupt, so circumstances vary.

Chapter 6

1. Afghanistan, Bangladesh, Benin, Cambodia, Cameroon, Chad, China, Djibouti, Eritrea, Ethiopia, Ghana, Guinea, Guinea Bissau, Iran, the Republic of Korea, the Lao People's Democratic Republic, Malawi, Mali, Morocco, Mozambique, Myanmar, Niger, Pakistan, Rwanda, Tajikistan, Uganda, and Yemen participated in the program.
2. Central American Health Institute, www.icas.net.
3. Although researchers attempted to control for underlying differences between the participants and nonparticipants, doing so remains a methodological challenge and should be taken into consideration in interpreting the results.
4. See "From Promises to Action: Recommendations for Gender Equality and the Empowerment of Women" (UN Millennium Project 2004b), which also discusses increasing opportunities for postprimary education.
5. Much of this section is based on Lewis 2004.
6. Eighty-one percent of Caribbean countries provide teacher to pupil ratios, suggesting that these countries have more difficulty obtaining population figures.

Appendix 2

1. This appendix is a summary of the civil society e-discussion the task force initiated to gain a better understanding of civil society's thoughts on education. The e-discussion took place from July 12, 2004 to August 1, 2004. These comments are based on an earlier version of the report, and the current version incorporates many of the comments.
2. The majority of these participants were part of the previous online dialogue on the gender equality report. One hundred and ninety-nine new people joined the group, and approximately 18 unsubscribed.

Appendix 3

1. This report was written by Maria Beatriz Orlando, research associate at the Center for Global Development.
2. Main sources of information: The World Bank; United States Agency for International Development; Academy for Educational Development; Inter-American Development Bank; Asian Development Bank; African Development Bank; Basic Education Coalition; United

Nations Educational, Scientific and Cultural Organization; United Nations Children's Fund; Research Triangle Institute; Save the Children; Programa de Promoción de la Reforma Educativa en América Latina y el Caribe; Creative Associates; and Care International.

3. Education reforms in Chile during the 1990s included several sectorwide initiatives that were implemented successfully under the General Education Improvement Programs (Proyectos de Mejoramiento Educativo), which provided funds for reforms at the school level. Schools applied for a fund (\$3,060–\$10,205, depending on enrollment) to implement an improvement project (see De Andraca 2003). In Uruguay, a World Bank project finances full-day schools (De Andraca 2003).

4. The implementation of school vouchers in Colombia was restricted to secondary education. However, this program contains education reform features that are relevant to primary education as well. This program was one of the largest voucher programs in the world (including developed countries) and one of the best designed and evaluated. In spite of the significant positive impact of this initiative the program was discontinued, perhaps for budgetary reasons.

5. Other comprehensive reforms in Southern Africa have been undertaken in Benin, Guinea, Malawi, and Uganda. All of these reforms have had good results in terms of increasing enrollment and improving quality.

6. Fuller and Rivarola (1998). See Patrinos and Ariasingam (1997) for a discussion about decentralization in education provision.

7. For a complete survey on school effectiveness see Scheerens (1999), Saunders (2000), and Pineros and Rodriguez (1999).

8. Other countries in Latin America have implemented similar evaluation systems. De Andraca (2003) summarizes evaluations of initiatives in Argentina (SINEC, established in 1993), Brazil (SAEB, implemented in 1990), and Costa Rica (since 1989).

9. In Iran, UNICEF finances a program tailored to the needs of rural working girls. The key elements to its success are promotion in the community, flexible hours, careful selection of female teachers, safe locations, interactive methods, and appropriate educational materials. In China, another UNICEF program provides basic education for out-of-school adolescents. More information on these projects can be found on UNICEF's Evaluation Database (<http://www.unicef.org/evaldatabase/>).

10. This program is based on the Nueva Escuela Primaria (New School) implemented successfully in Colombia since 1975. In Colombia, the Nueva Escuela has significantly improved access to and quality of education in rural areas. Multigrade schools have been implemented in several Latin American, Asian, and African countries. Costa Rica started a pilot multigrade school project in 1995. In the Dominican Republic, multigrade schools are a tool to improve equity (see multiphase program described below). For more on Latin American countries implementing multigrade schools, see De Andraca (2003). For more on multigrade schools in Africa see UNICEF (2004c).

11. De Andraca (2003) has more information about this project.

12. See World Bank (1999b, 2003a) and PREAL (2003).

13. This project is supported by UNICEF. Helgesson (2001) points out the great gains in education access thanks to COBET. One remaining challenge of this project is how to place COBET graduates in the formal school system (few children continue to secondary school).

14. This project is also supported by UNICEF. COPE's methods and materials have been evaluated and considered highly effective (Dewees 2001). However, the program suffers from high rates of failure and desertion, in part because it remains as a parallel alternative to the formal school system (Dewees 2001).

15. This program has had remarkable success and students are able to advance two to four grades in one year (De Andraca 2003).

16. The African Girls Education Initiative is a partnership among countries, donor governments, and UN agencies (UNESCO and UNICEF) launched in 1994. The initiative helps countries develop policies and programs that respond to the specific nature of their girls' education challenges. This program has helped produce girls enrollment increases in Guinea (15 percentage points), Senegal (12 percentage points), Benin (9 percentage points), and Chad in short periods of time (UNICEF 2003).

17. The project faces obstacles to finding dedicated staff and motivating regional officers (Sarti Malone and Haihambo-Muetudhana 2002).

18. The World Food Programme has supported similar programs around the world. For more information see World Food Programme (2003b).

19. School fees have also been eliminated in Kenya, Malawi, and Tanzania. Enrollment increased drastically after this measure in all three countries in a very short period of time. The jump in enrollment caused crowded classrooms and created new challenges for education quality (UNICEF 2004c).

20. According to the World Food Programme (2003a), the increase in enrollment for girls was 197 percent. Student attendance and dropout rates were also positively affected.

21. The Inter-American Development Bank is supporting these programs. (www.iadb.org).

22. The World Bank's cumulative lending for early child development programs increased from \$100 million in 1990 to approximately \$1,100 million in 2000.

23. The World Food Programme school feeding programs alone covered 15.6 million children in 64 countries during 2002. See World Food Programme (2003b).

24. For more information about this program see Smith and Wexford (2000).

Appendix 4

1. In some countries the net enrollment ratio will miss underage children who have passed through school and graduated before the expected age for finishing primary school. Though the numbers of such children can be significant in some countries, for most countries they are a very small share of the total. Thus for the Middle East and North Africa in 1999/2000 more than 69 percent of children in Lebanon and 35 percent of children in Morocco entered school one year later than the official entry age, whereas in the United Arab Emirates almost half the new entrants to primary school were one year younger than the official entry age. In Sub-Saharan Africa, by contrast, only six countries had more than 10 percent of children entering before the official age for entry (though this may be affected by age rounding).

2. ISCED was revised in 1997. ISCED 1997 introduced a division of upper secondary programs into ISCED 3A general education and ISCED 3B technical education. ISCED 4 covering postsecondary, nontertiary programs was also introduced. Primary education cycles (ISCED 1) are largely comparable before and after 1997, but comparison is very difficult for secondary (ISCED 2 lower and ISCED 3 upper), which may include programs that were subsequently classified as ISCED 4 after the introduction of the 1997 classification. UIS is undertaking a major program of work to evaluate the impact of the 1997 change.

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